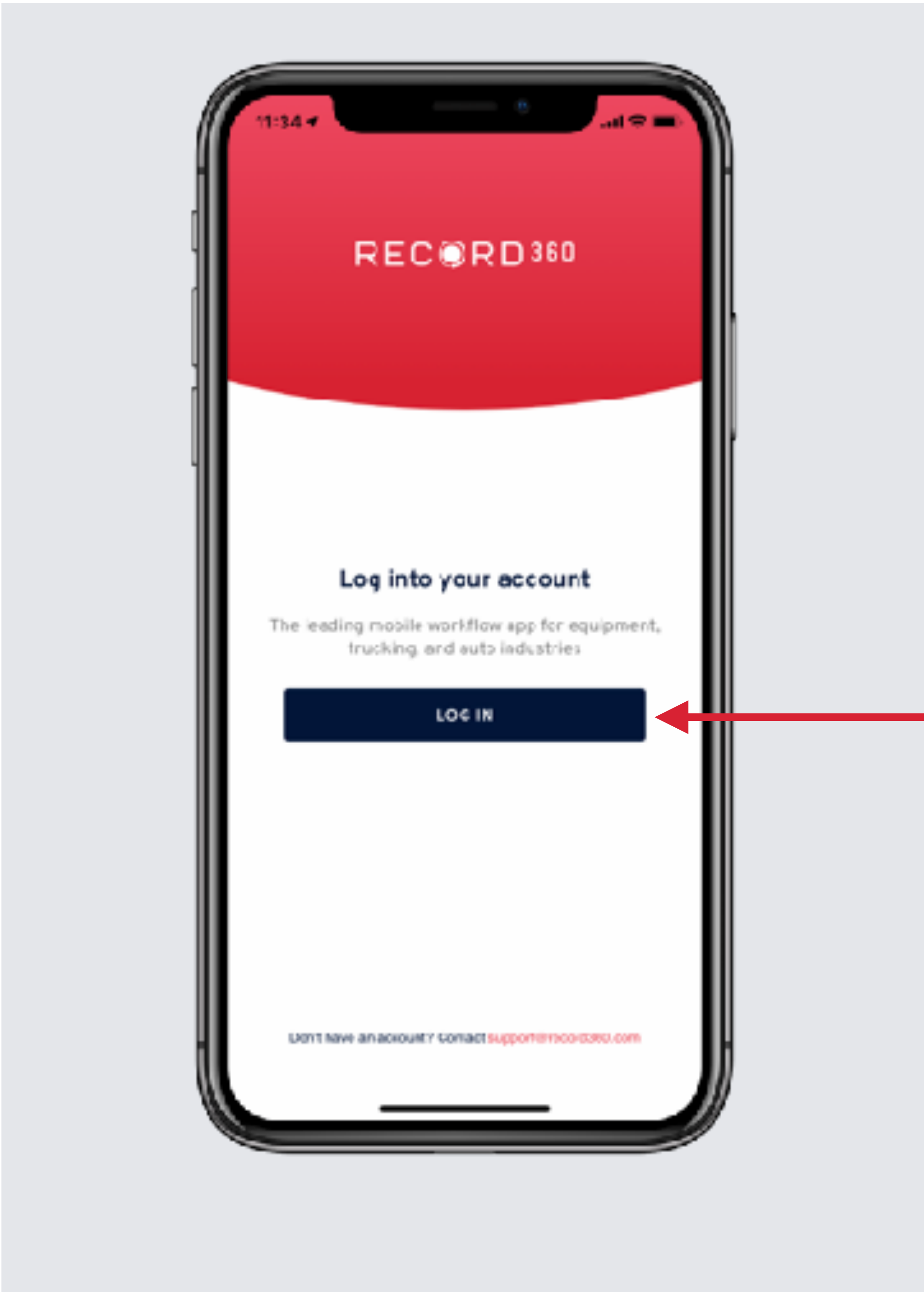
Getting Started with Record360

Mobile App

How to create an inspection

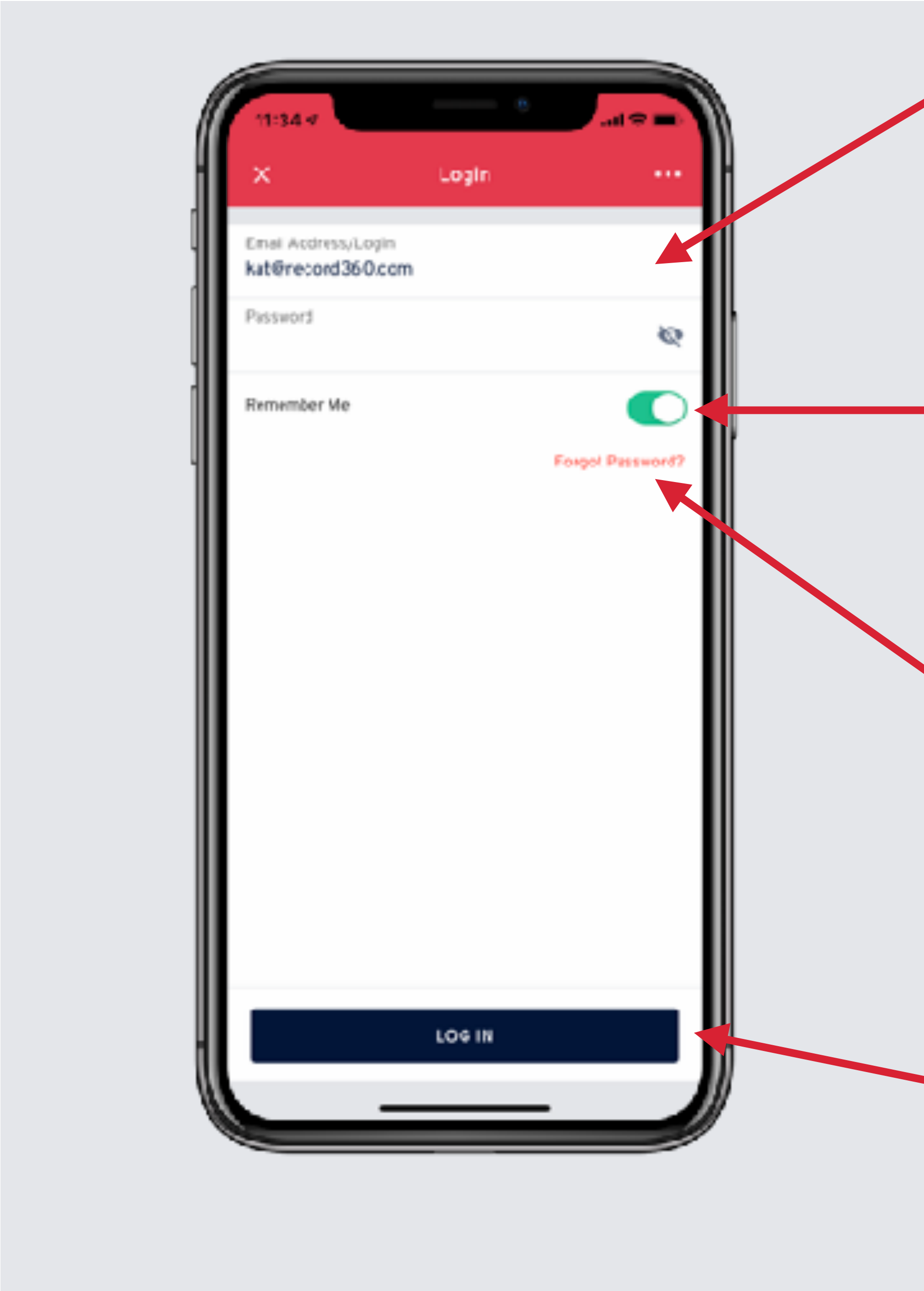
Log In



Download Record360 from the **App Store** or **Google Play**

Open the app and tap “Log In”

Log In



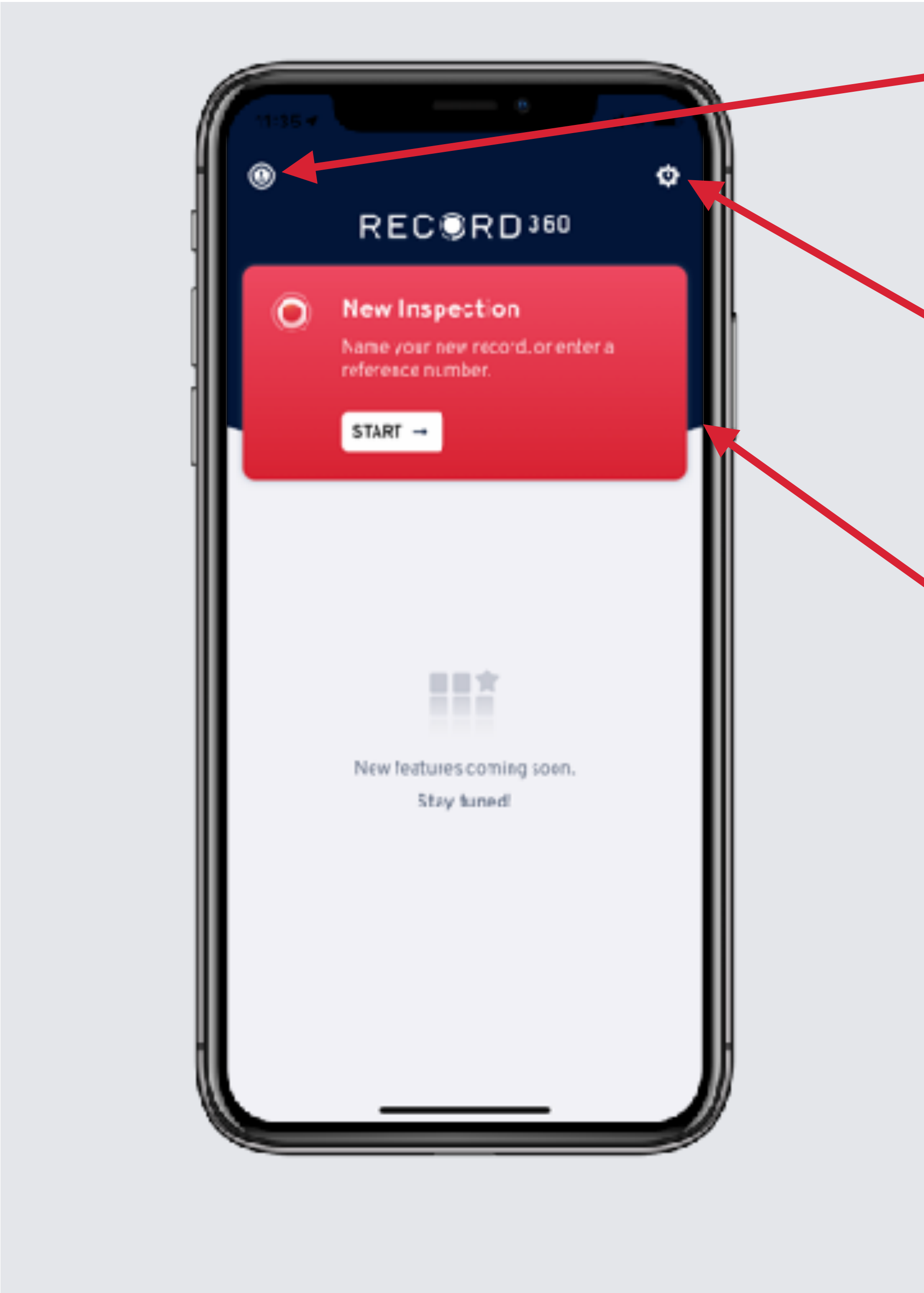
Enter your email address & password

Tap “Remember Me” to save your login details for next time

Tap “Forgot Password?” if you can’t remember your password

Tap “Log In”

Home

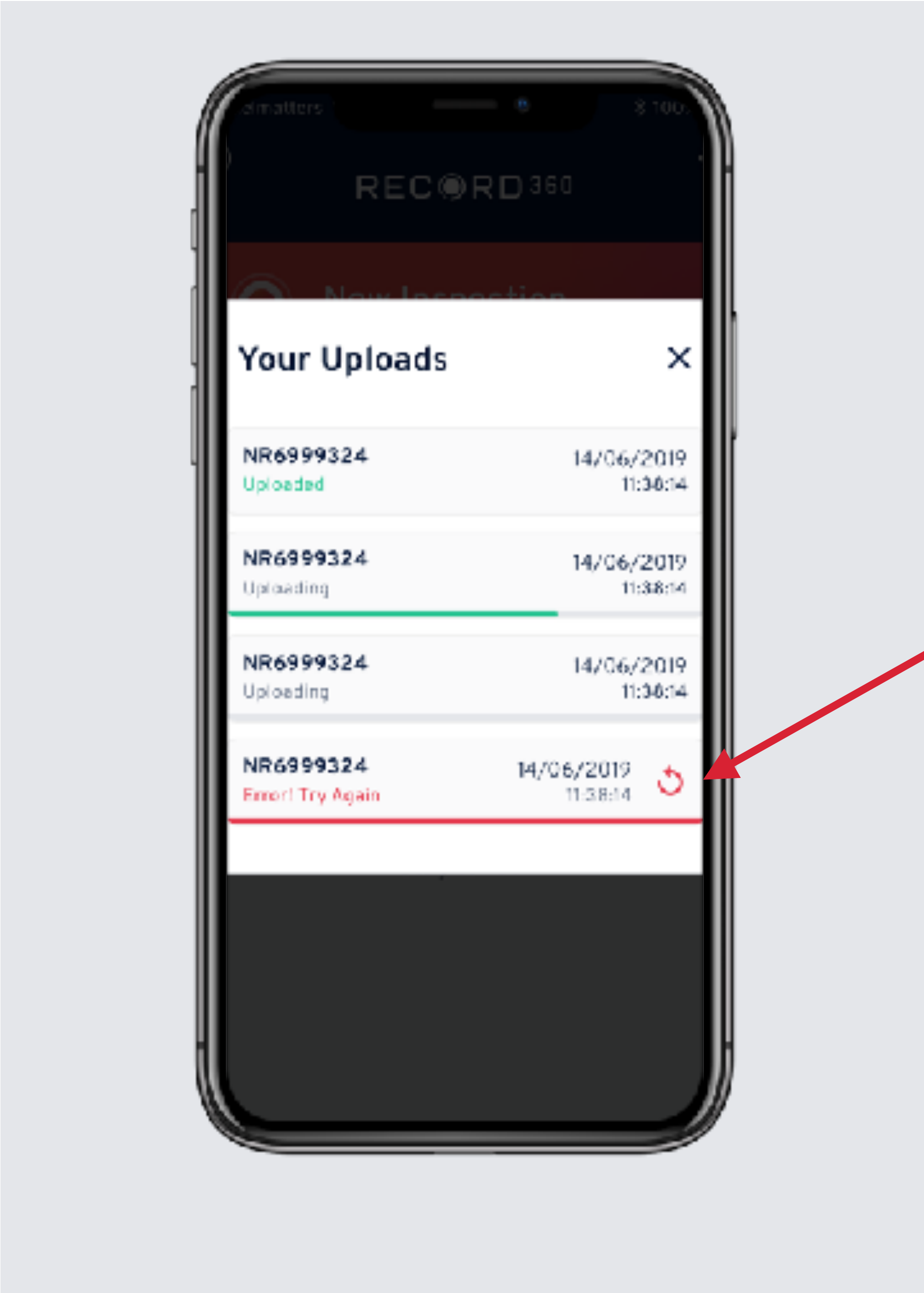


Tap the “Uploads” icon to view your pending uploads

Tap the “Settings” wheel to edit your app settings

Tap “New Inspection” to start a new inspection

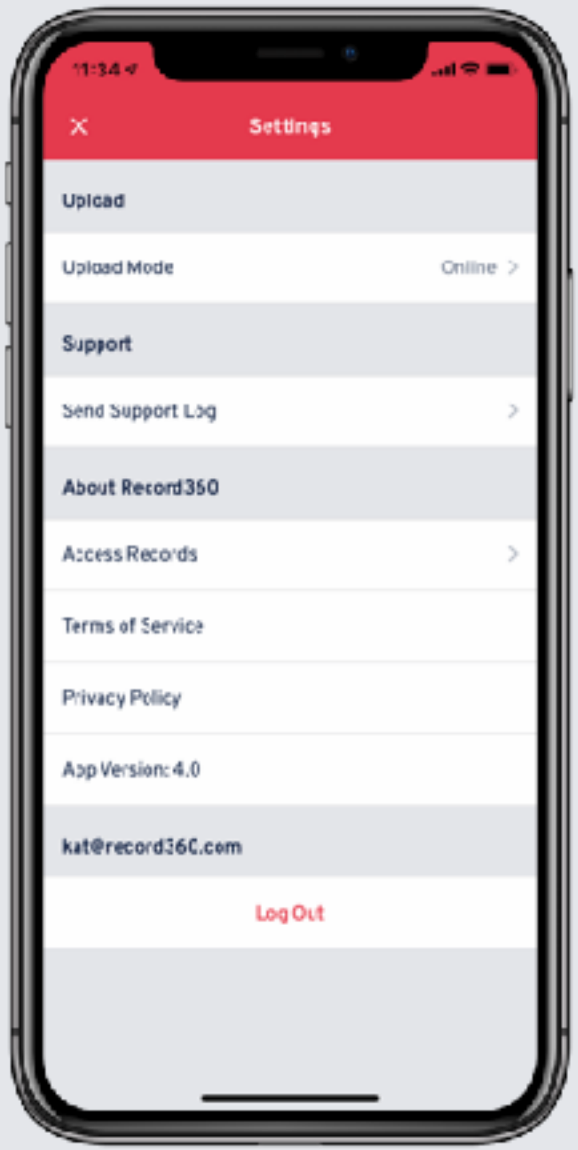
Pending Uploads



Here you can see all pending uploads. As your inspections successfully upload, they will disappear from this list.

If your upload fails, tap the red arrow to retry. If your upload continues to error, try moving to an area of higher connectivity.

Settings



Here you can change your app settings.

Upload Mode: Select whether to create inspections using WiFi, mobile data, or a combination of both.

Send Support Log: Notify our Support team if the app is not working.

Access Records: View your completed inspections in our dashboard.

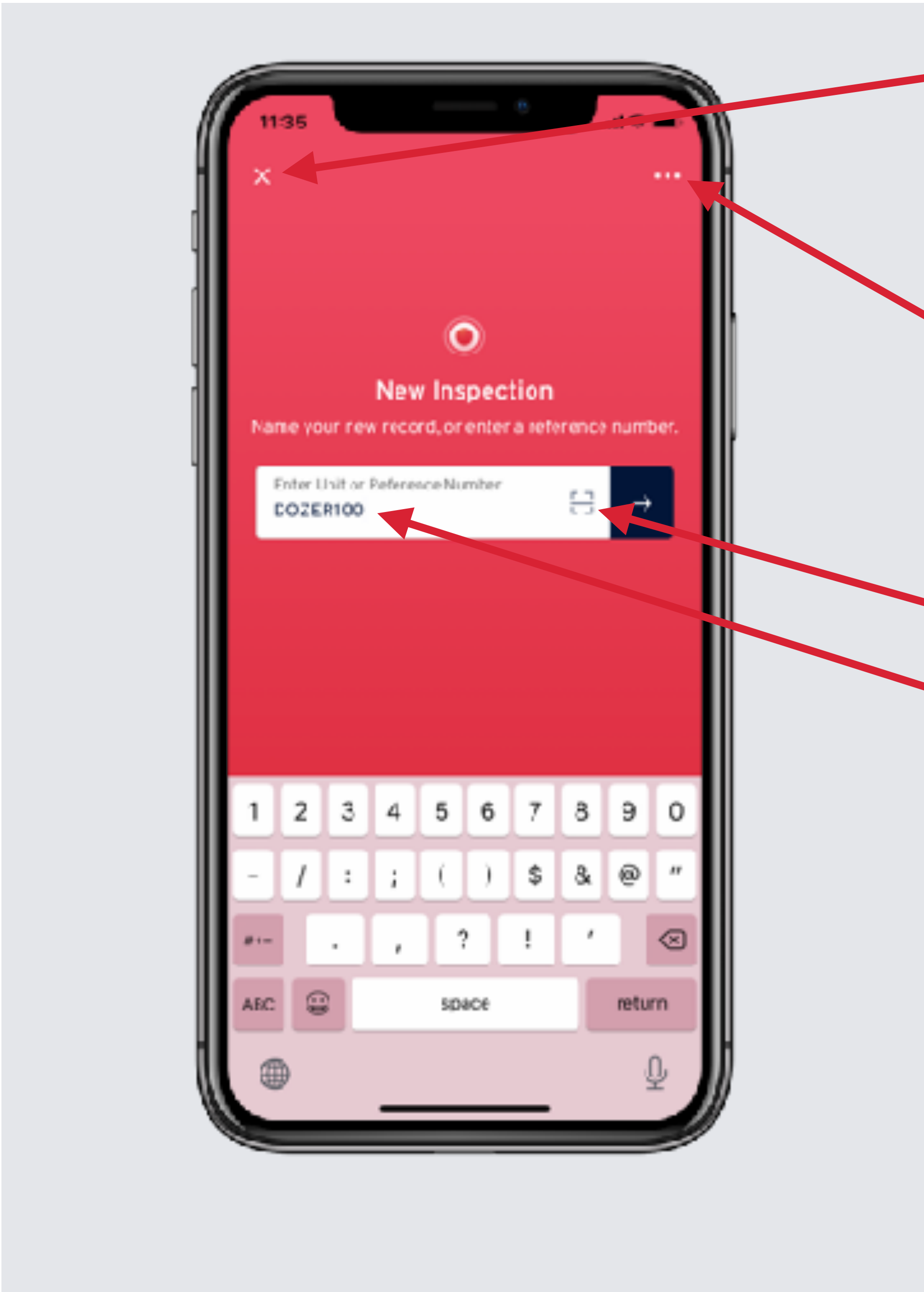
Terms of Services: Read our terms and conditions.

Privacy Policy: Read our policies around data management and privacy.

App Version: Determine which version of the app you are using.

Log Out: Tap here to log out of your account.

New Inspection

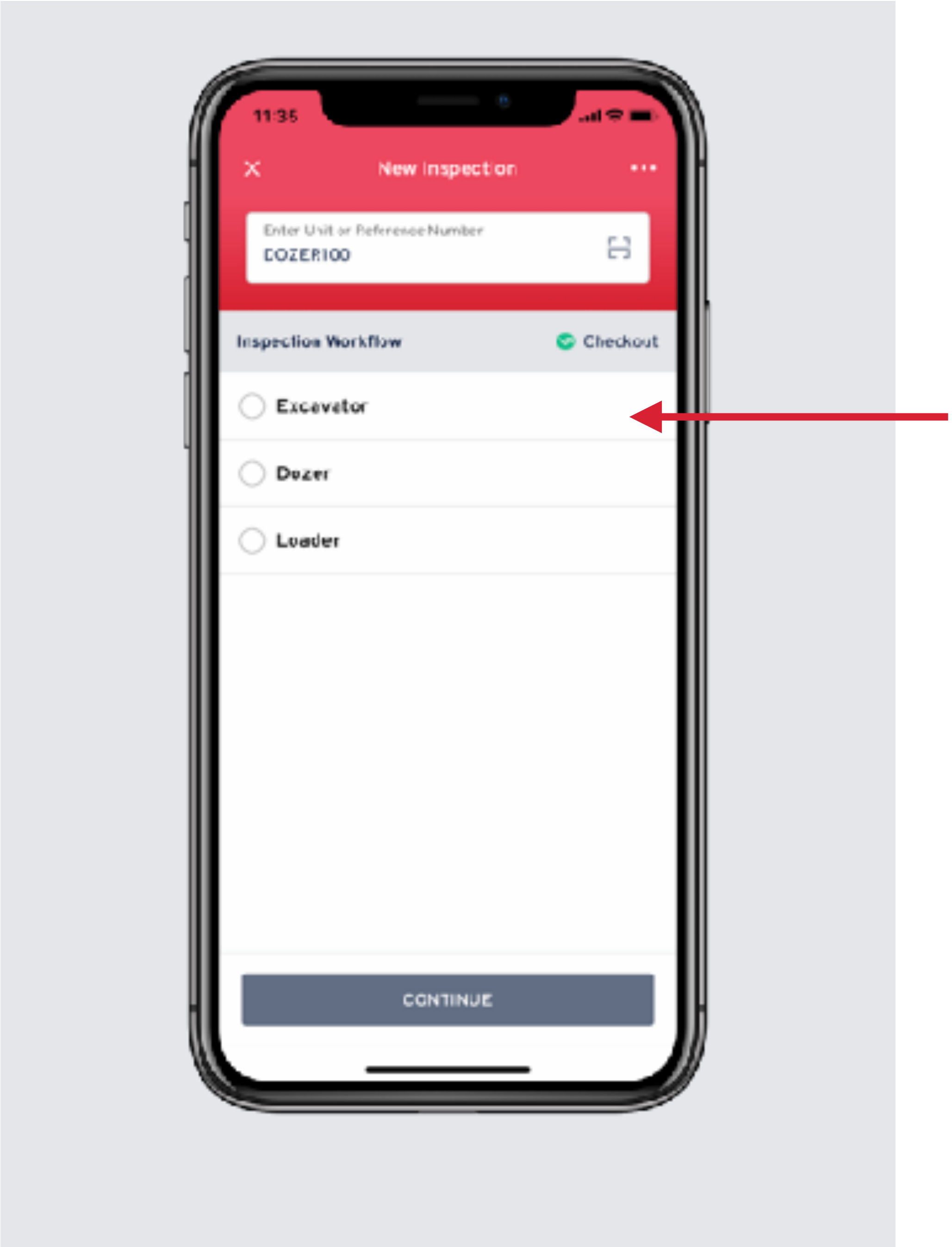


Tap the "X" to delete this inspection and start over

Tap the "..." to send a Support Log

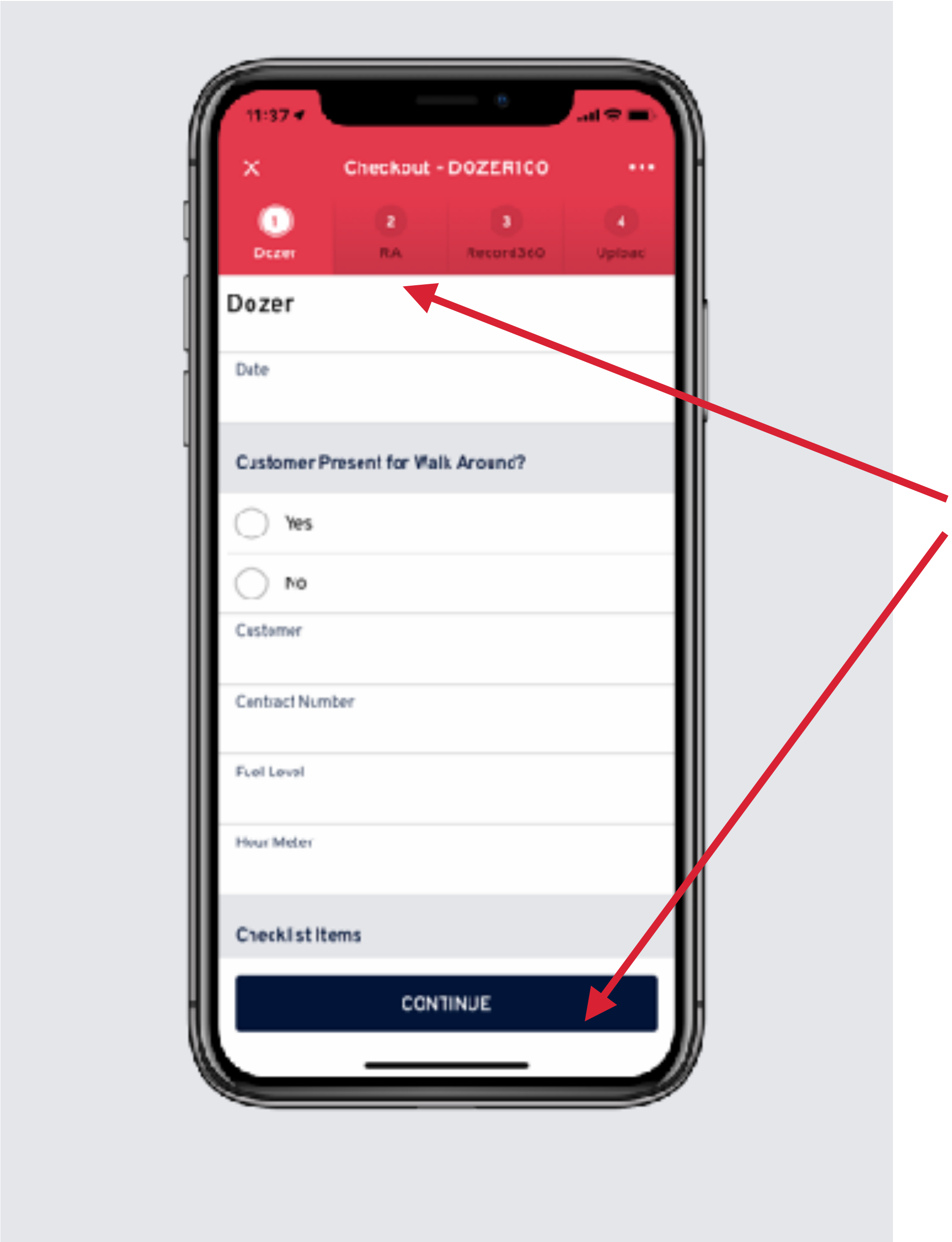
Type in a unit number OR tap the "Scanner" icon to get started.

Select Workflow



Select your desired workflow

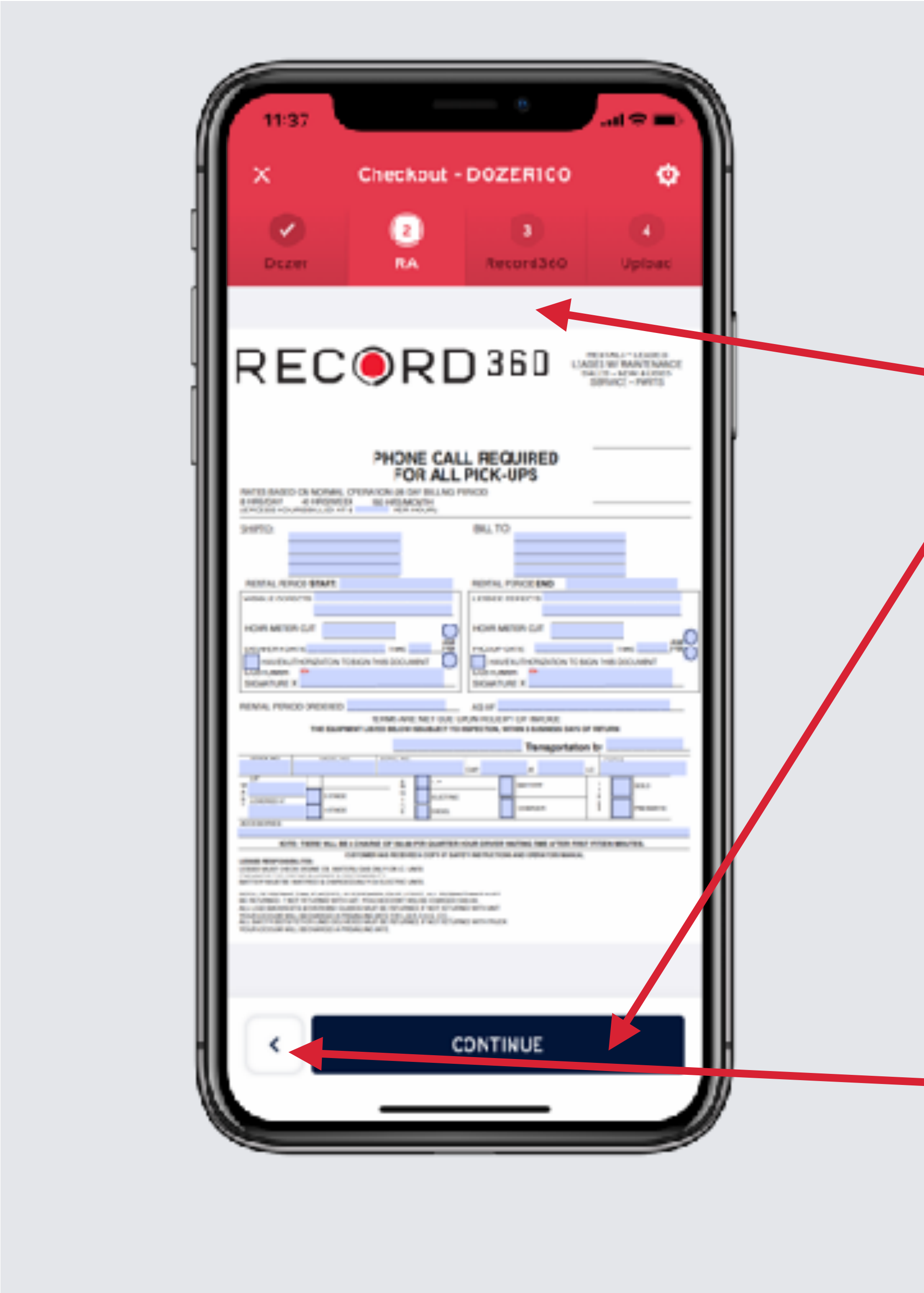
**Note, this screen will only appear if you have multiple workflows*



Fill out your checklist.

Tap “Continue” or tap the numbered steps at the top when you’re ready to move on.

Digital Form



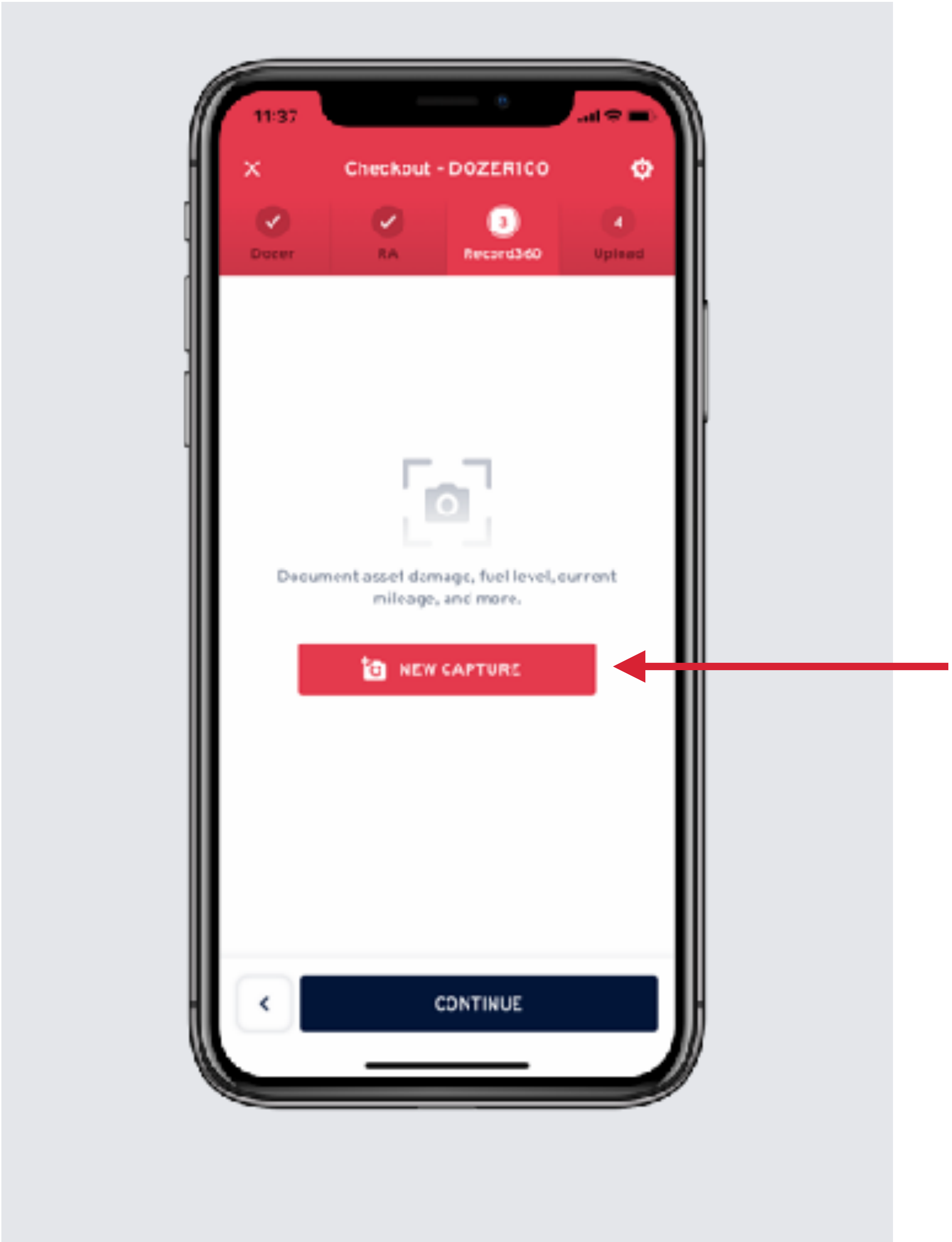
Fill out your digital form.

**Note, this screen will only appear if you have digital forms configured*

Tap “Continue” or tap the numbered steps at the top when you’re ready to move on.

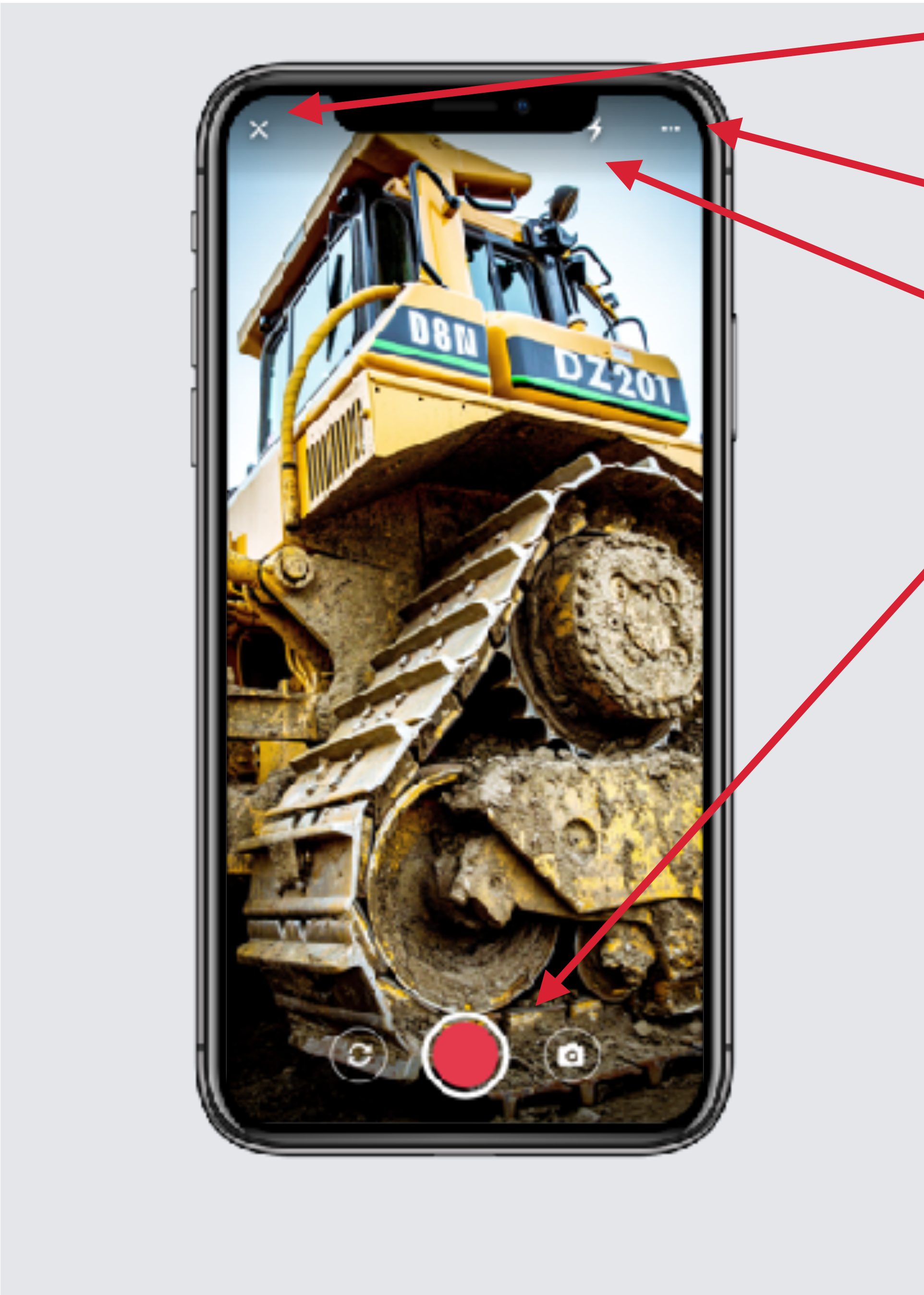
You can always access previous steps by tapping the back arrow or the numbered steps at the top.

Media



It’s time to add photos and videos to your inspection. Tap “New Capture” to open the camera.

Camera



Tap the "X" to leave the camera at any time

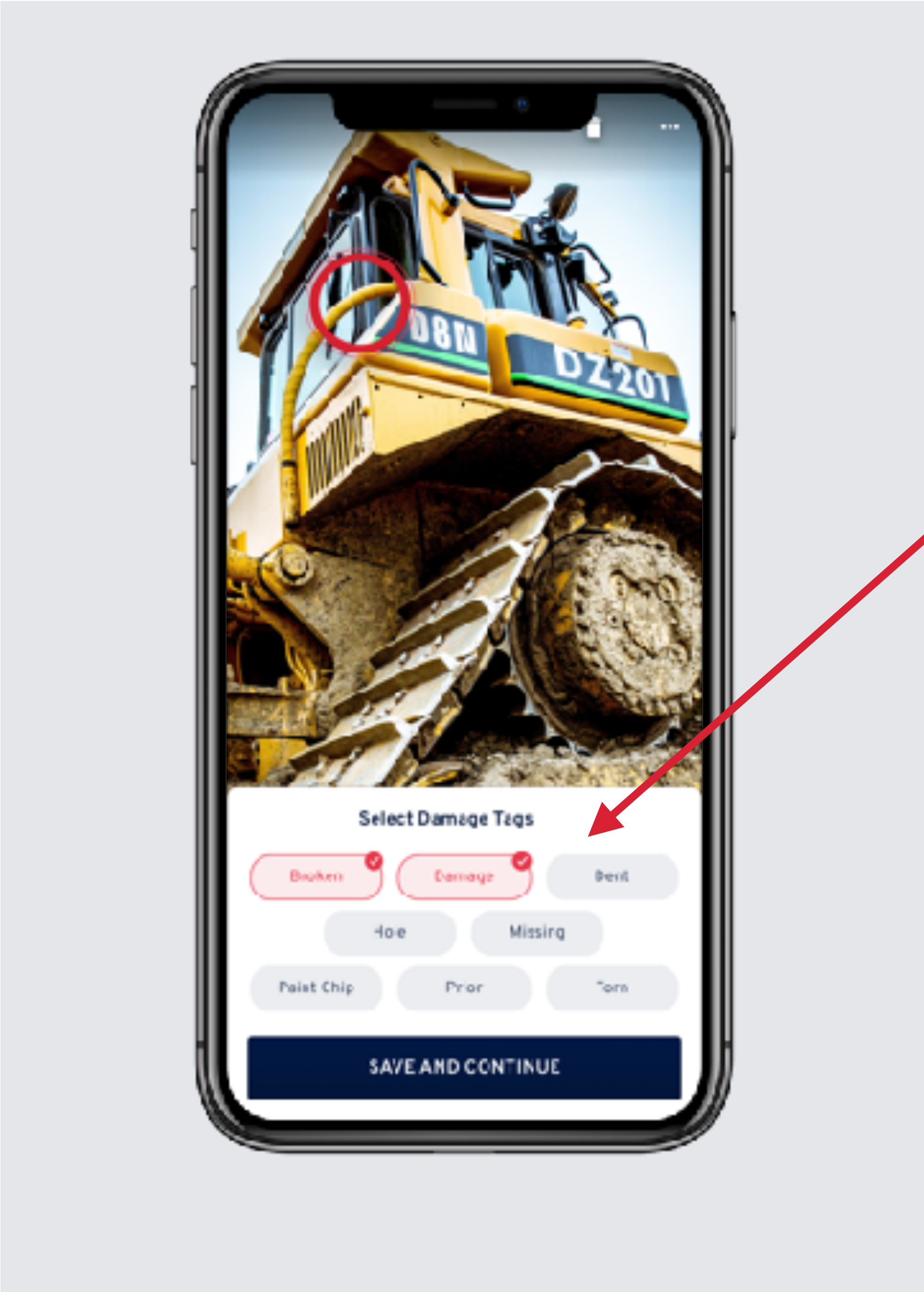
Tap the "..." for additional camera settings

Tap the "Lightning" to turn flash on or off

You have three options to capture media:

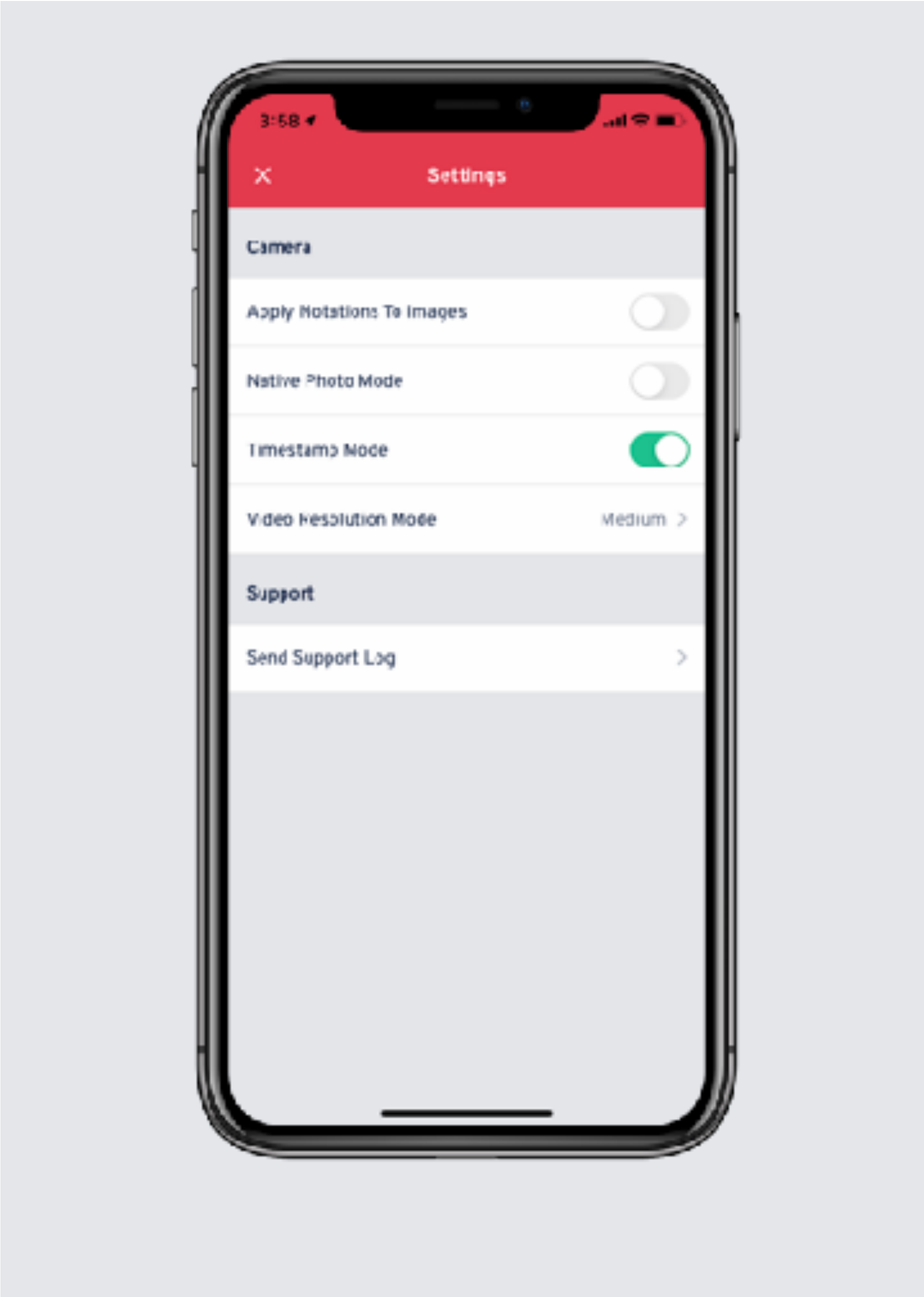
1. Tap anywhere on the screen to mark an area as damaged; you will see a popup to select your damage tags
2. Tap the red "Video" button to record a video (you can also tap the screen during the video, to take photos of damage)
3. Tap the "Camera" button to take a single photo

Damage Tags



After you mark an area as damaged, you can select tags to categorize the damage

Camera Settings



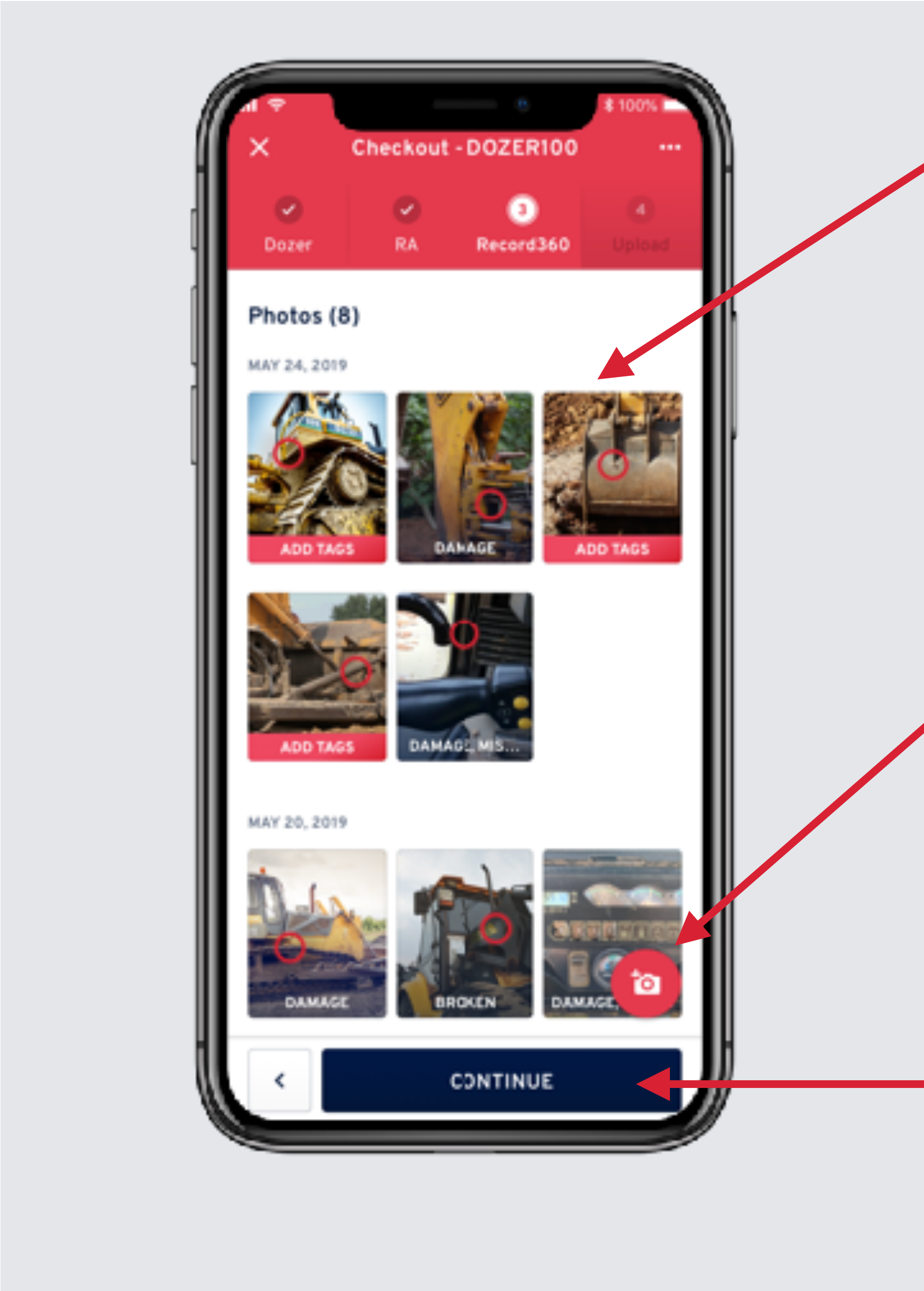
Here you can change your camera settings.

Apply Notations to Images: Select whether to include your damage tags

Native Photo Mode: Select whether to use the Record360 camera, or your native phone camera. The native phone camera will be higher resolution, but it will also take longer to upload your inspections. If you require very high resolution media, we recommend turning on Native Photo Mode.

Timestamp Mode: Select whether to include a timestamp with each photo/video you take.

Video Resolution Mode: Select what resolution you need for your videos.

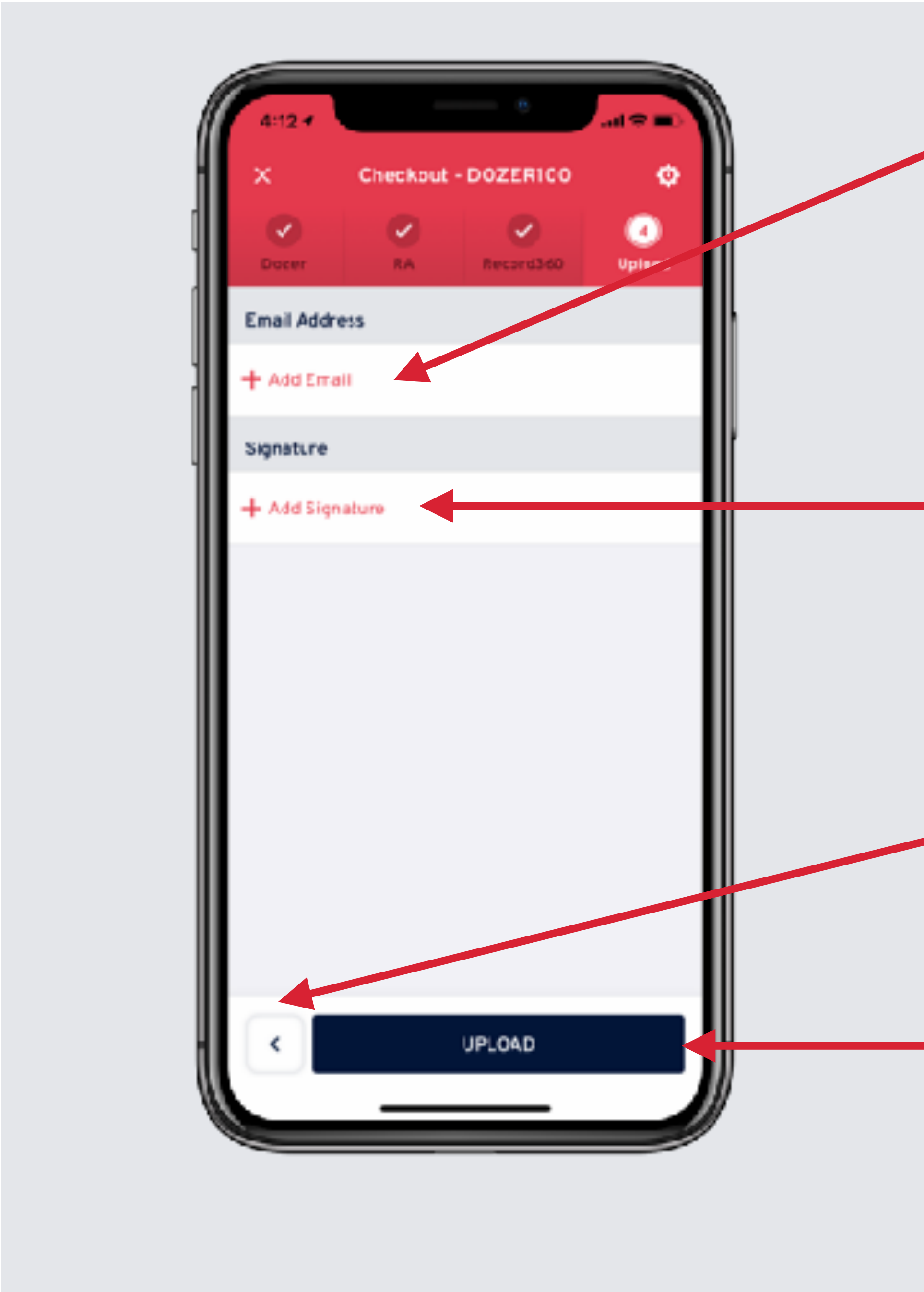


Tap on any photo or video to zoom in, add damage tags and notes, or to delete it

If you need to re-open the camera to take additional photos or videos, tap the red “Camera” icon

If you’re ready to move on, tap “Continue”

Upload



You can send a summary of this inspection to any valid email address. Tap "+ Add Email" to add a new recipient.

To capture a signature, tap "+ Add Signature". Type in the signee name and then sign on the screen with your finger.

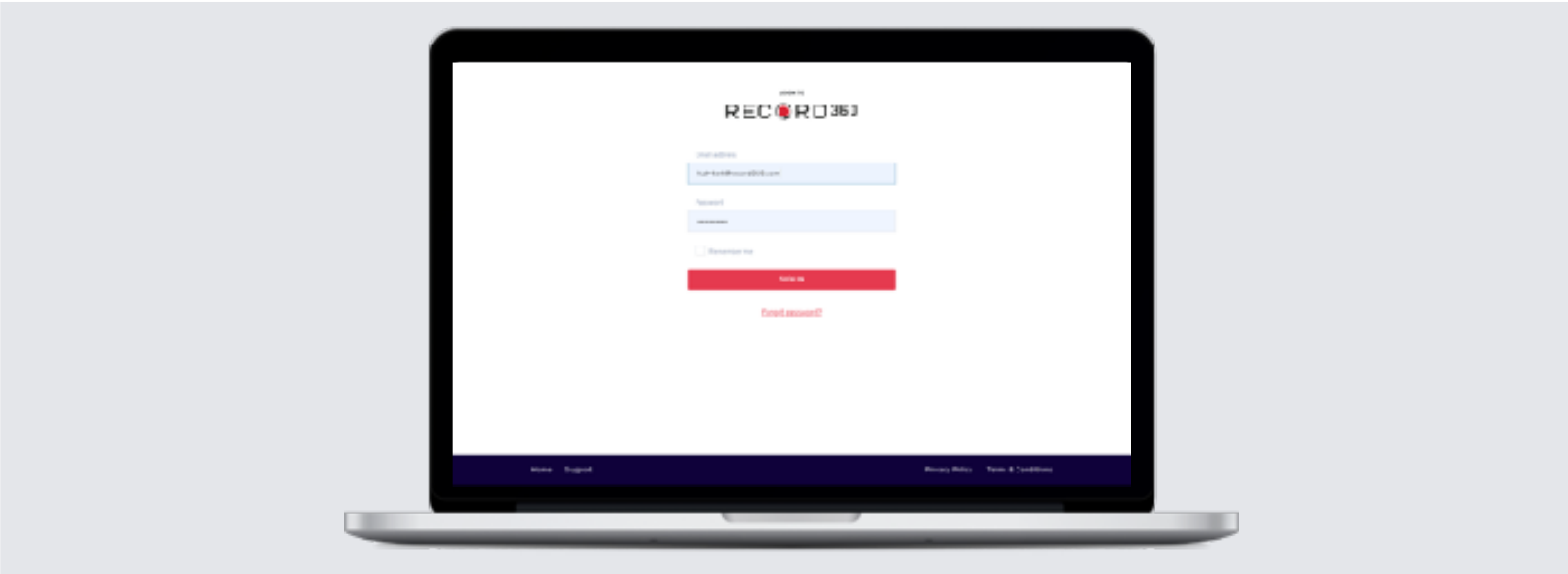
You can go back to review previous steps by tapping the back arrow or the numbered steps at the top.

Once you're ready to upload, simply tap "Upload". Your inspection will be saved to the cloud.

Dashboard

How to access the dashboard

Log In



Go to **dashboard.record360.com**

Enter your email & password

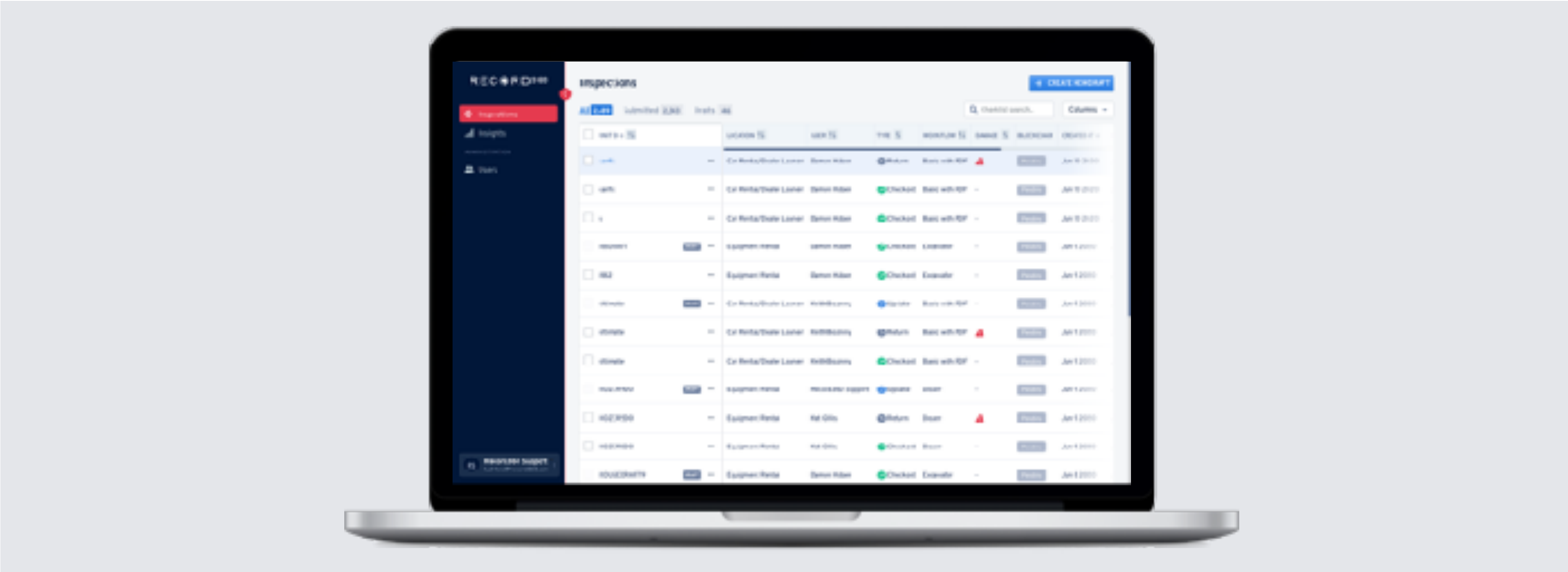
Click “Remember Me” to save your login details for next time

Click “Forgot Password?” if you can’t remember your password

Click “Sign In”

How to manage your inspections

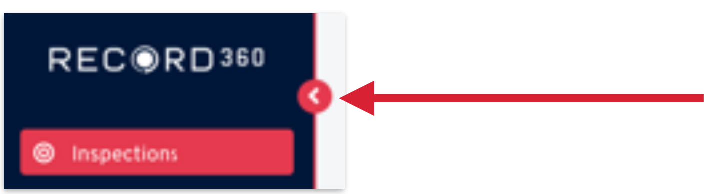
Home



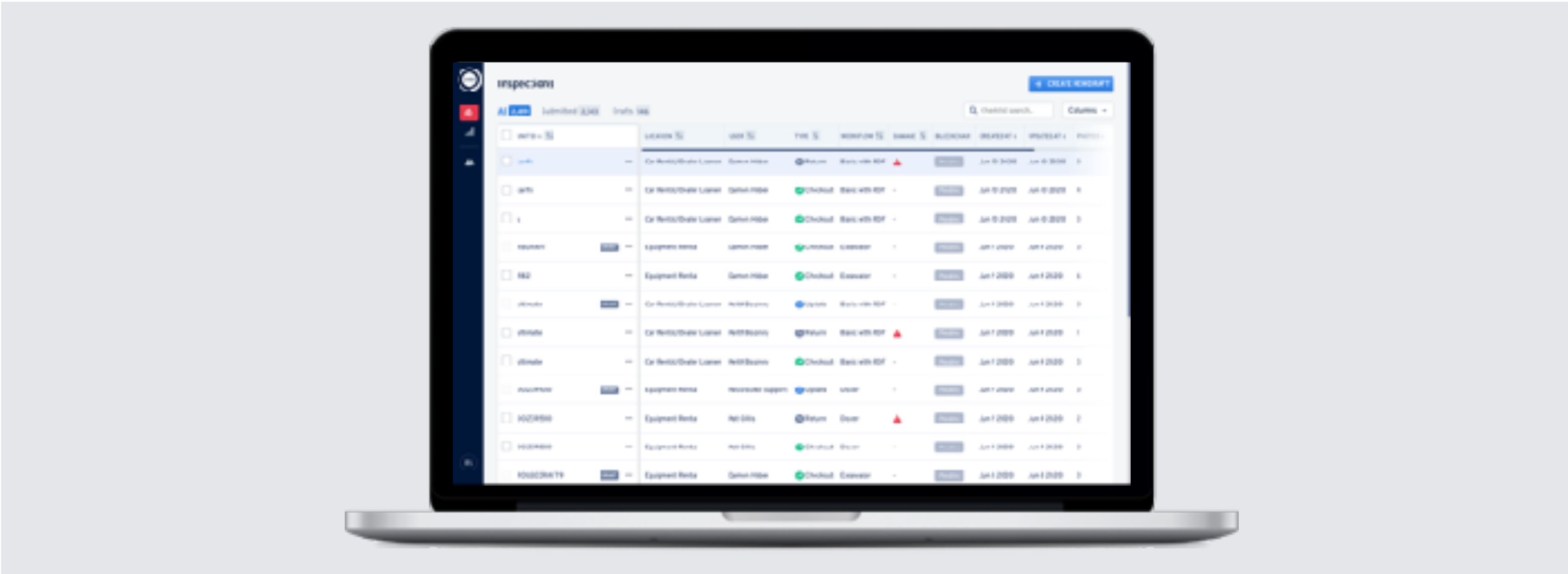
You'll see a few sections on the lefthand side.

1. **Inspections:** See a list of all inspections in your account.
2. **[Managers Only] Insights:** View employee usage reports.
3. **[Managers Only] Users:** See and manage all users in your location.
4. **User Profile:** Access your user profile and logout.

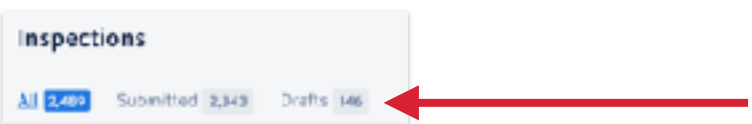
Hover over the blue panel and click on the red arrow at the top to minimize the panel.



Inspections List



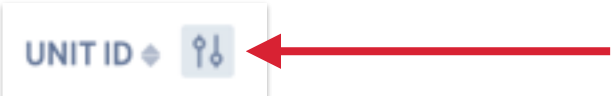
View your total inspections in the counters at the top. “Submitted” are inspections that have been successfully uploaded from a mobile device. “Drafts” are draft inspections that haven’t been completed yet.

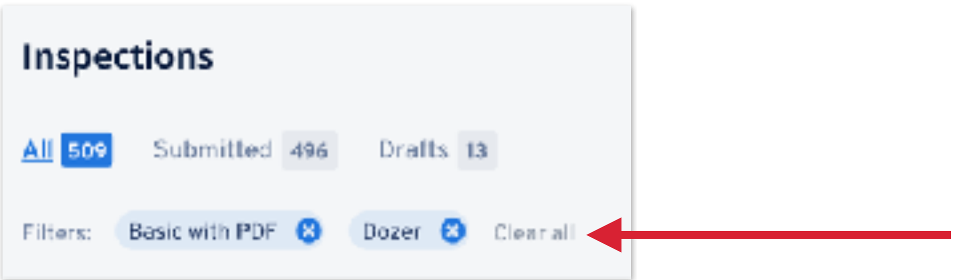


Sort any column with the up/down arrow icon. Click once to sort in descending order; click again to sort in ascending order.

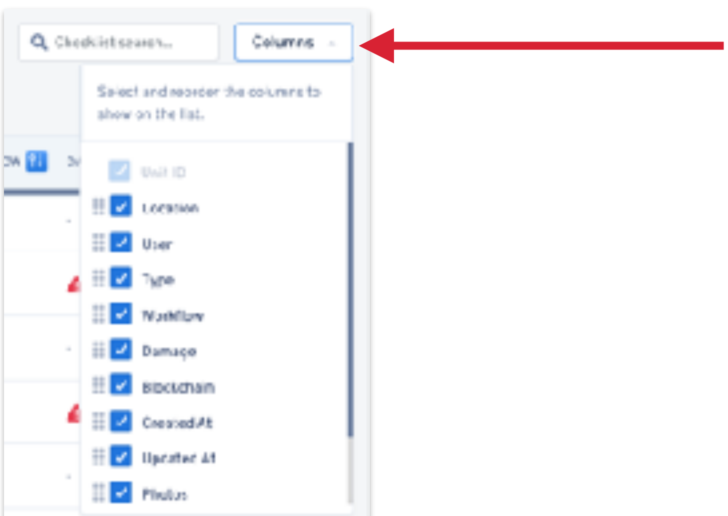
Inspections List

Filter directly on any column with the filter icon. Click on the filter icon, search for whatever you need, and apply as many filters as you need. Click “Clear All” at the top to remove your filters.



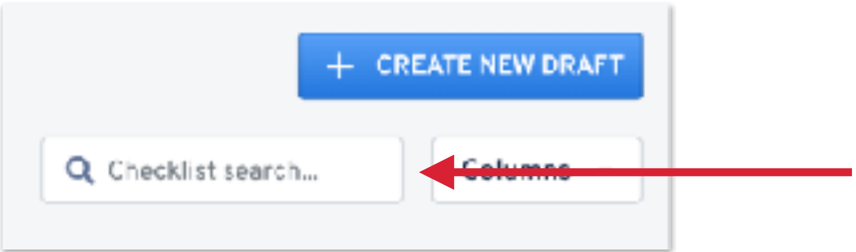


Click “Columns” to hide and reorder your columns. Your view will be saved within the same browser session. If you logout, your view will be cleared out and reset to show all columns.

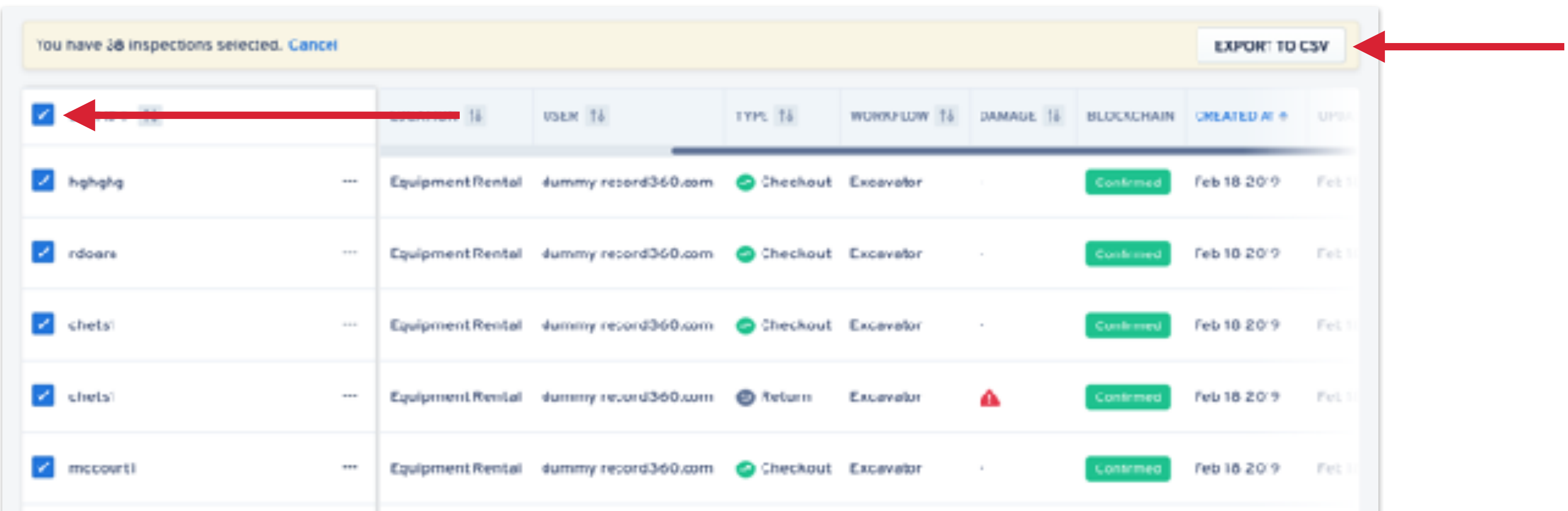


Inspections List

"Checklist search" lets you search for any field within a checklist or digital form. For example, if you have a checklist field called "Contract Number", you can use this field to search for any contract number.

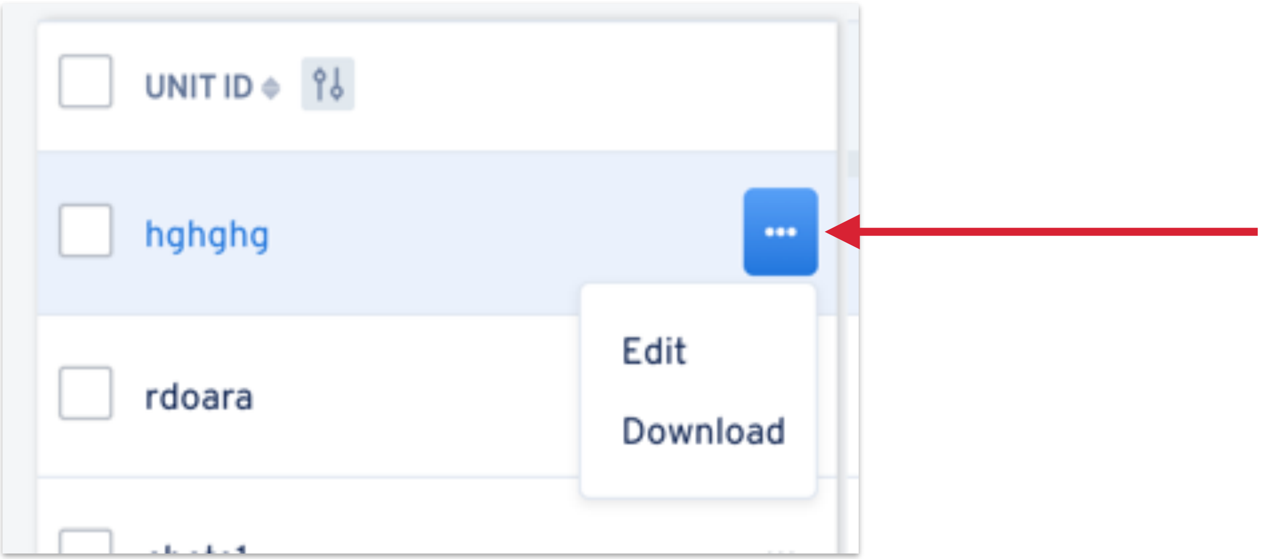


Check off multiple inspections to export them to CSV. Simply click the checkbox on the lefthand side to select an inspection. To select your entire page at once, click the checkbox at the top.



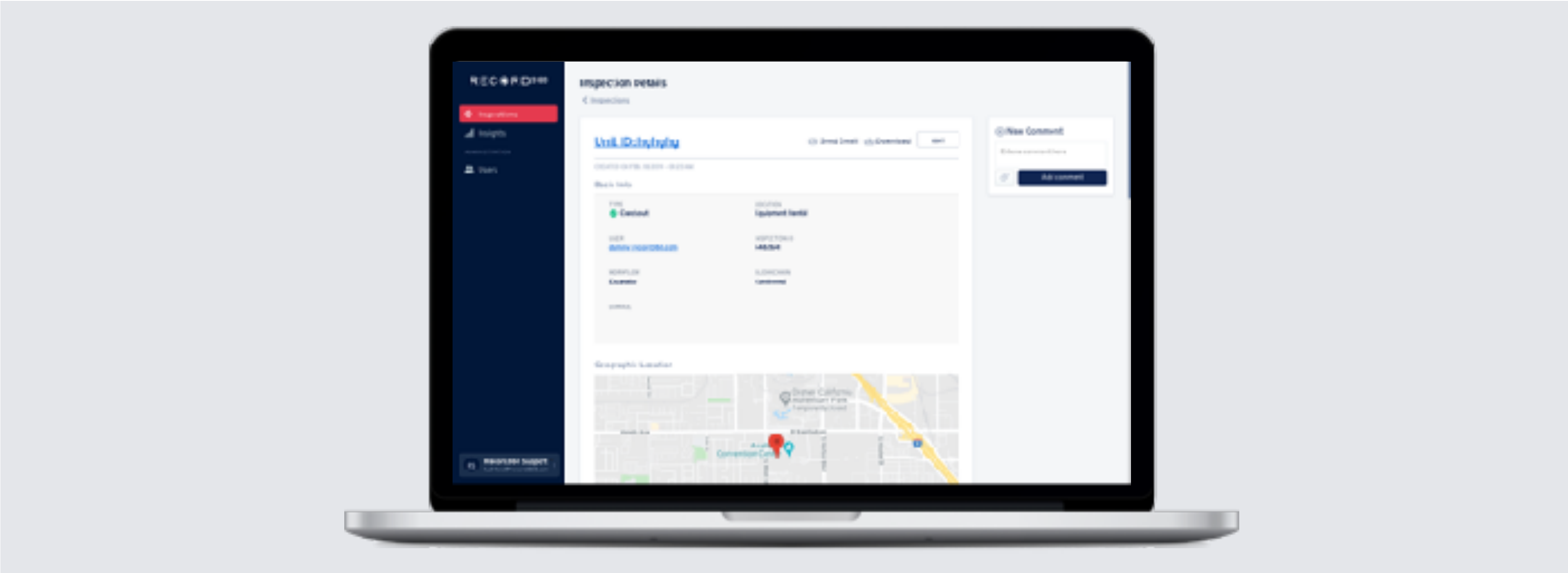
Inspections List

To access “Quick Actions” from the list view, click on the “...” to the right of any inspection.



From here, click “Edit” to edit the unit ID or damage on that inspection. Click “Download” to download a copy of the Inspection Summary PDF.

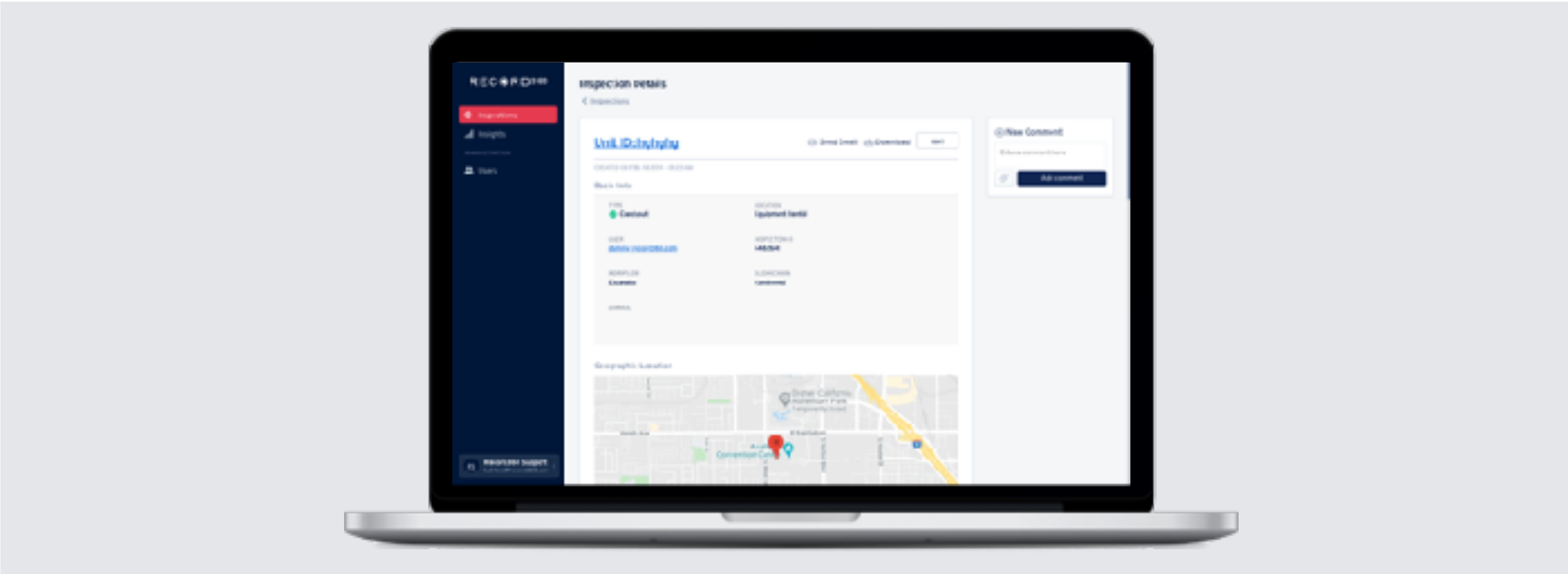
Inspections View



Click into any inspection from the list view to see a more detailed view.

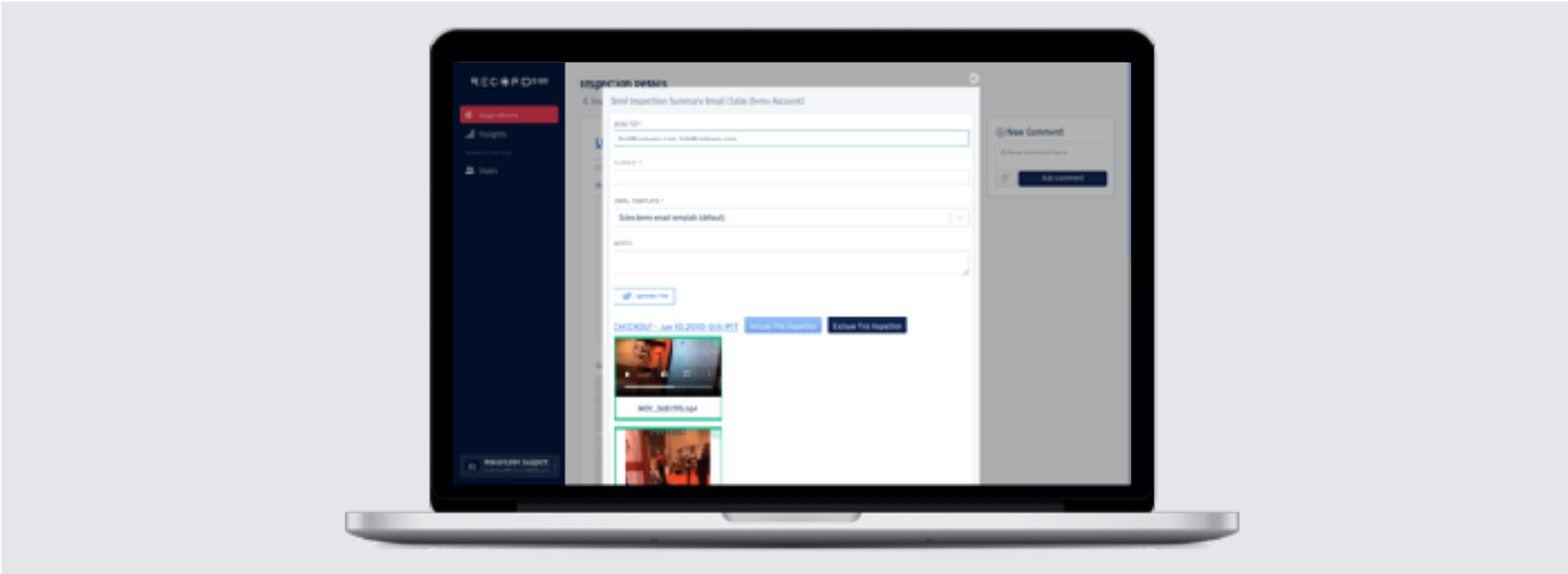
1. **Basic Info:** See background details for this inspection.
2. **Geographic Location:** View a map of the exact geolocation this inspection took place.
3. **Checklists:** If your inspection included any checklists, they will show up here.
4. **Forms:** If your inspection included any digital forms, they will show up here. You can view & download them.
5. **Media (Photos, Videos, Signatures, License):** All your photos, videos, signatures, and licenses will show up here. You can click to view them in full resolution or download them.
6. **Activity Log:** See the history of any actions taken on this inspection.

Inspections View

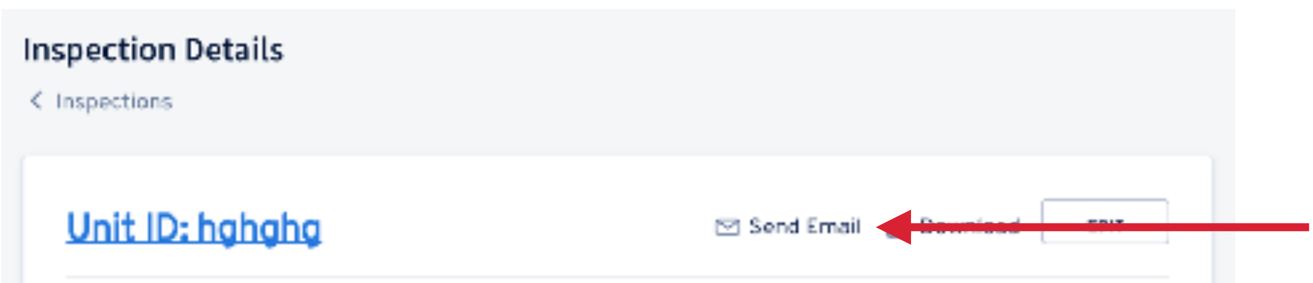


Use the “Comments” section on the righthand side to leave comments on your inspection. You can also add attachments, like supporting documents or additional photos, for your colleagues to review. After you’ve typed in a comment or added an attachment, click “Add Comment”.

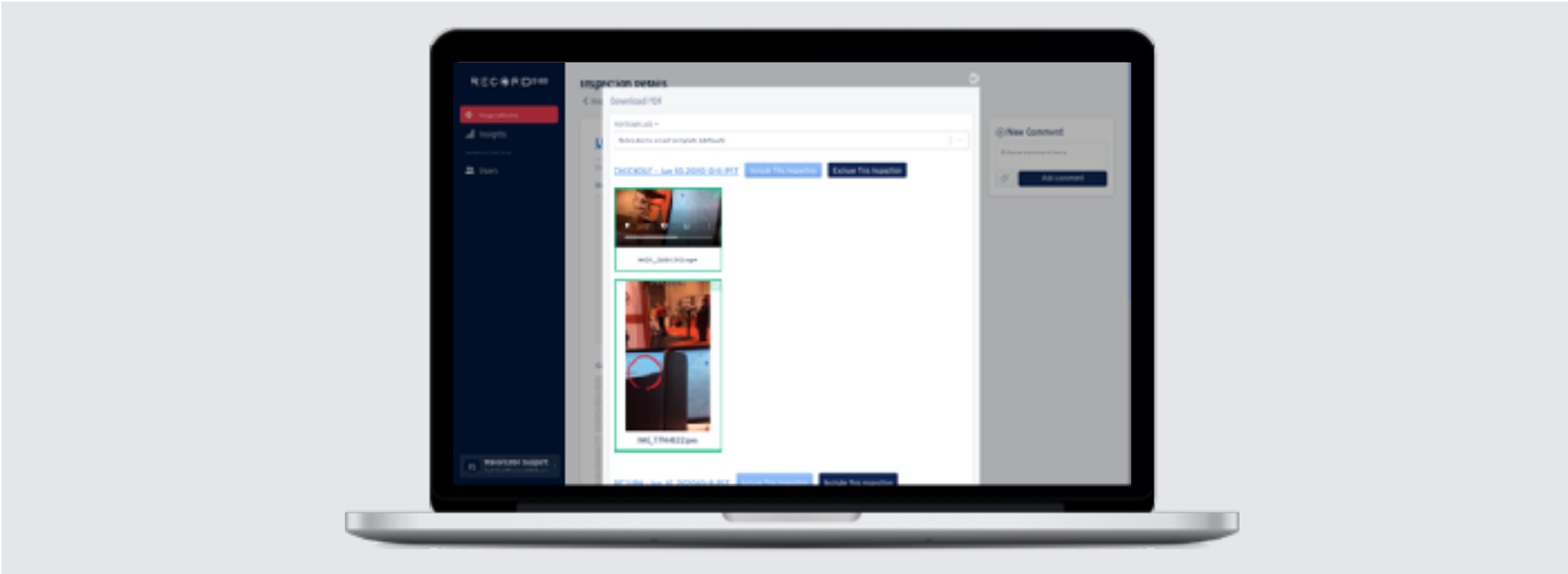
Inspections View



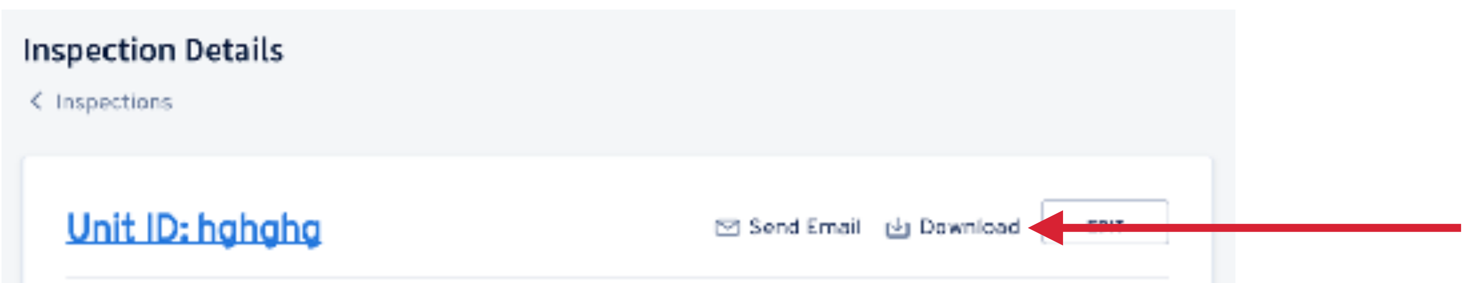
Click “Send Email” at the top to send someone an Inspection Summary Email. This will send them a copy of the inspection for their records.



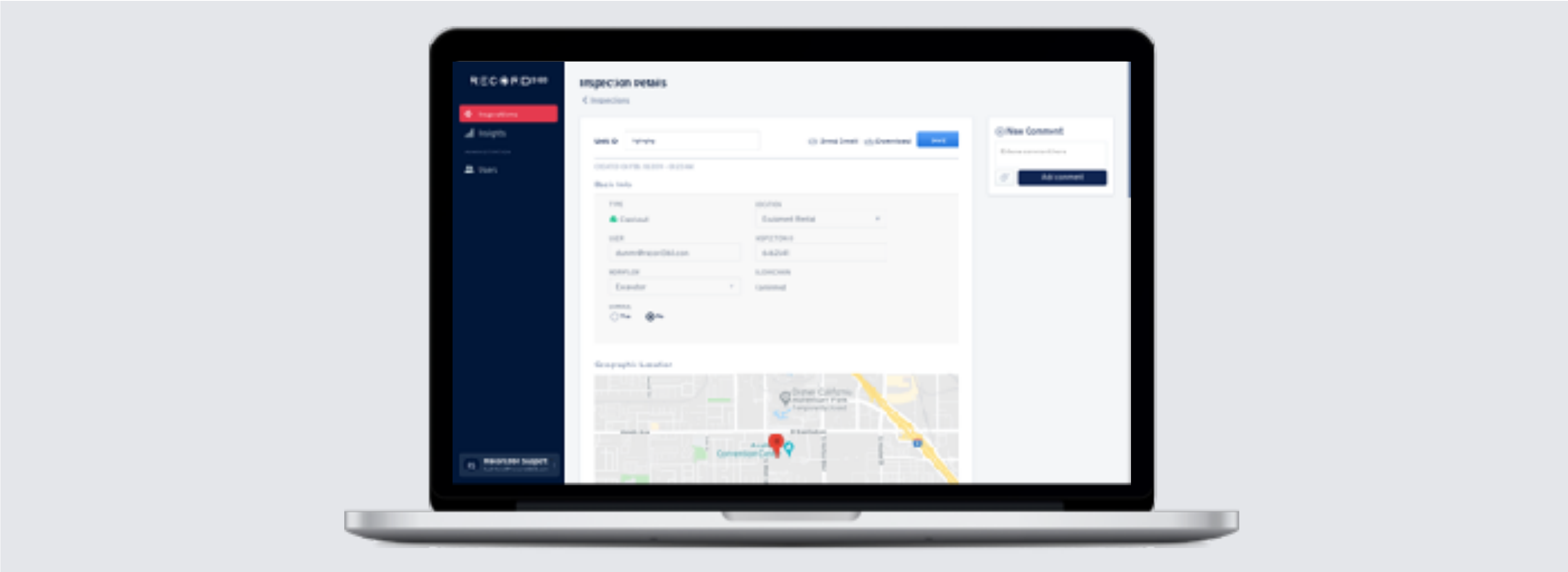
Inspections View



Click “Download” at the top to download a copy of the Inspection Summary PDF.



Inspections View



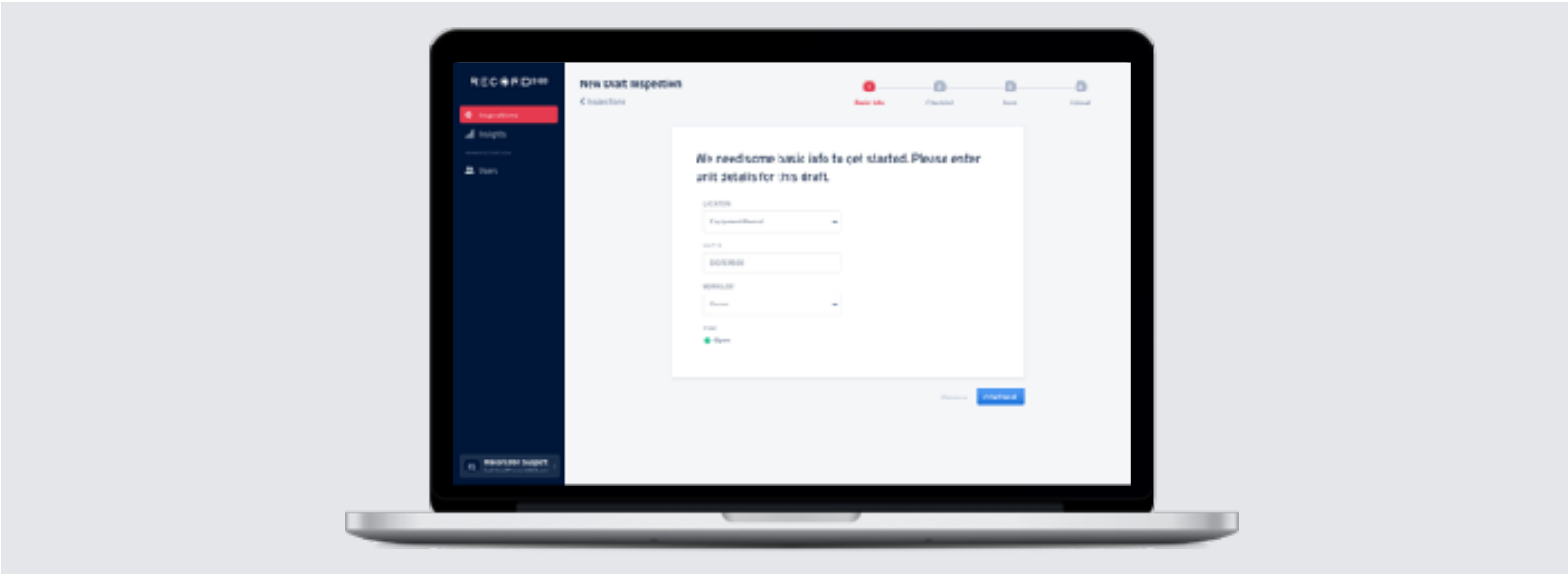
Click “Edit” at the top to edit your inspection. The only two fields you can edit are the Unit ID and Damage.

Why can’t I edit other fields? *Our inspections are secured with blockchain. This means they can’t be edited after they are uploaded from a mobile device. This is designed to protect you and your customers, to prevent data from changing after someone has provided a signature.*

What if I <u>need</u> to correct wrong data? *Log into the mobile app, type in your unit ID, and create an “Update” inspection . This will create a brand new inspection, with the latest data. You can also use the “Comments” section on the righthand side to simply leave comments on the inspection itself.*

How to create a draft

Create a Draft

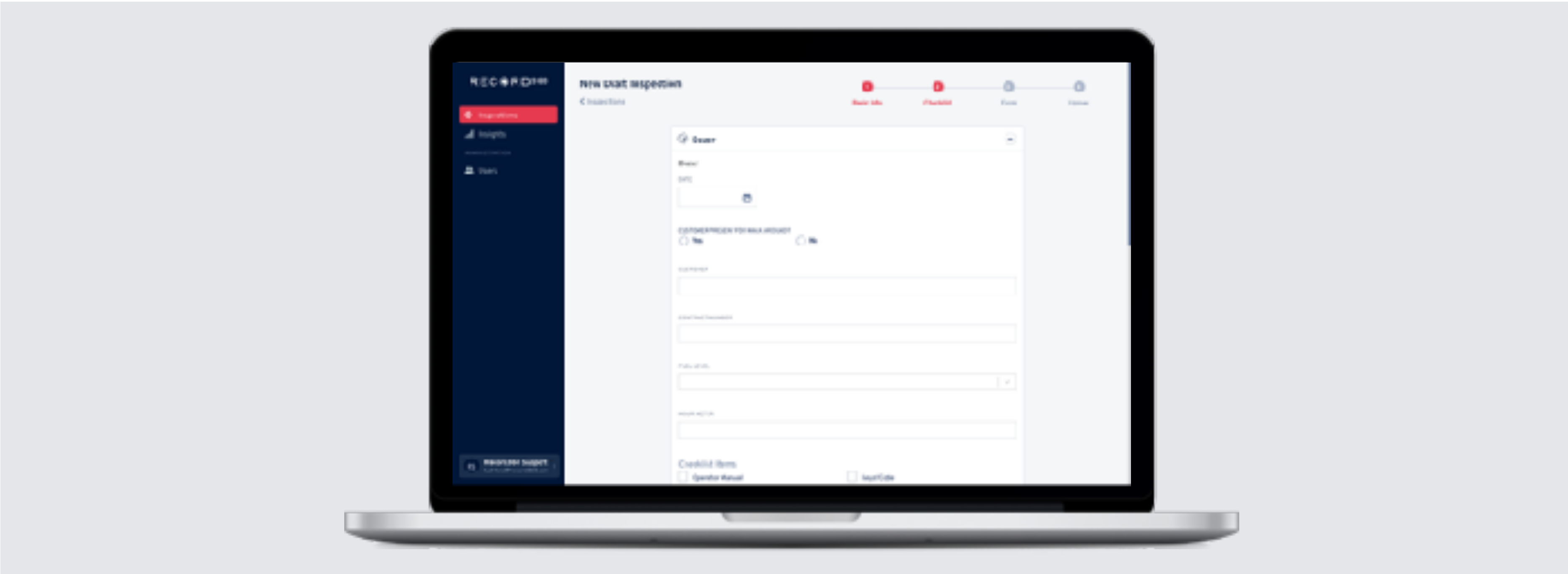


Drafts let you start an inspection from a desktop computer, and send it to a mobile device to be completed and uploaded. This can speed up your inspection process, and make it easier to get more units out the door. Simply have your counter agents create a draft from inside the office; and then notify your yard guys when the draft is ready to be finished outside.

Click “+ Create New Draft” in the top right corner of the inspections page.

Fill in your Location, Unit ID, and Workflow details.
**Note, all Drafts must be an “Open” inspection. You cannot create an “Update" or “Return” draft.*

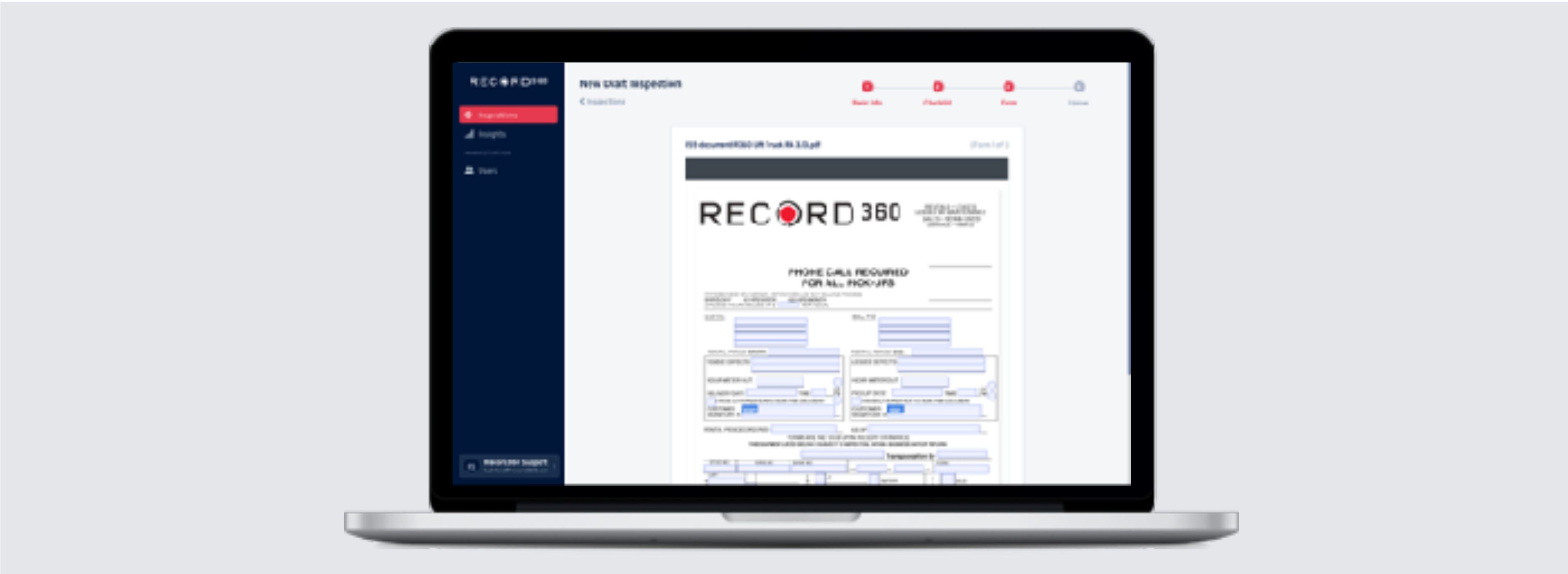
Create a Draft



Fill in the checklist to the best of your ability. Leave the inspection and pass/fail items blank, so your yard guy can fill those out later.

Click “Continue”.

Create a Draft

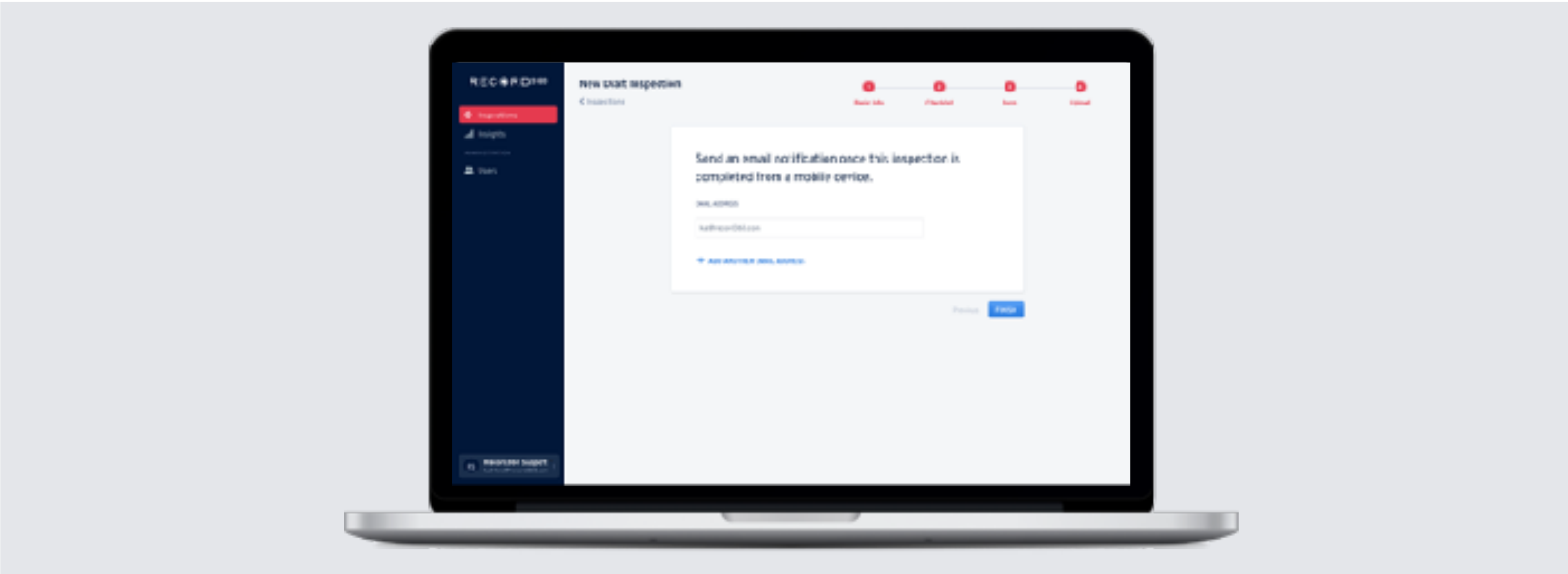


Fill in the digital form to the best of your ability.

**Note, this screen will only appear if you have digital forms configured*

Click “Continue”.

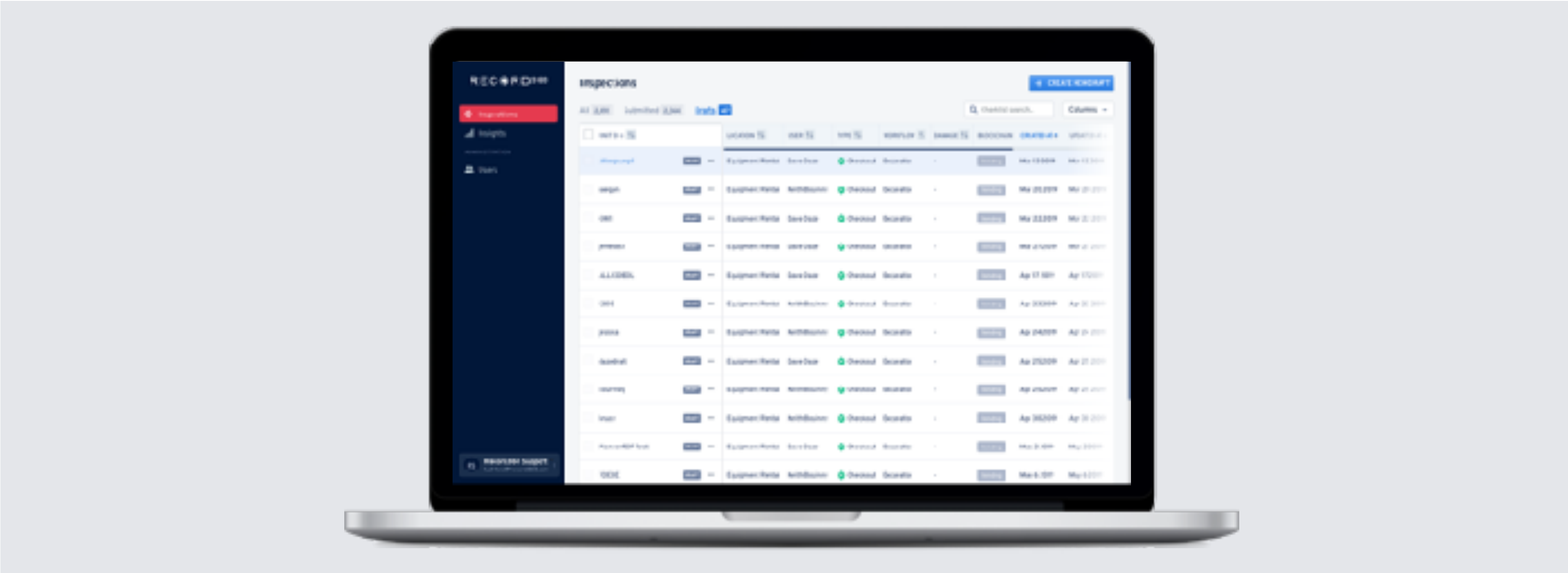
Create a Draft



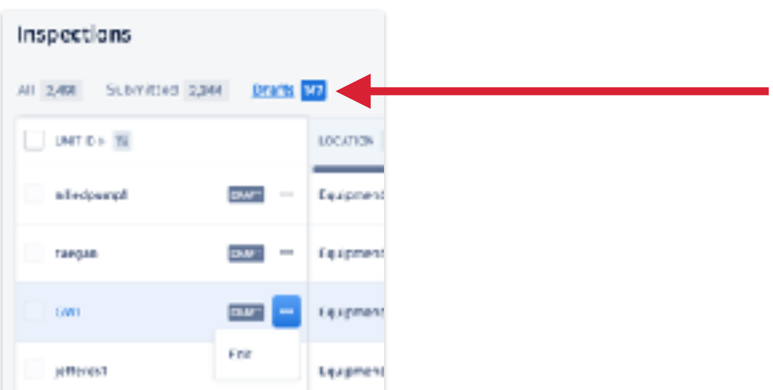
Lastly, enter the customer email or an email for anyone who should receive a copy of the completed inspection. Click “+ Add Another Email Address” to add additional emails.
**Note, this will ONLY send an email after the inspection has been completed and uploaded from a mobile device*

Click “Finish”.

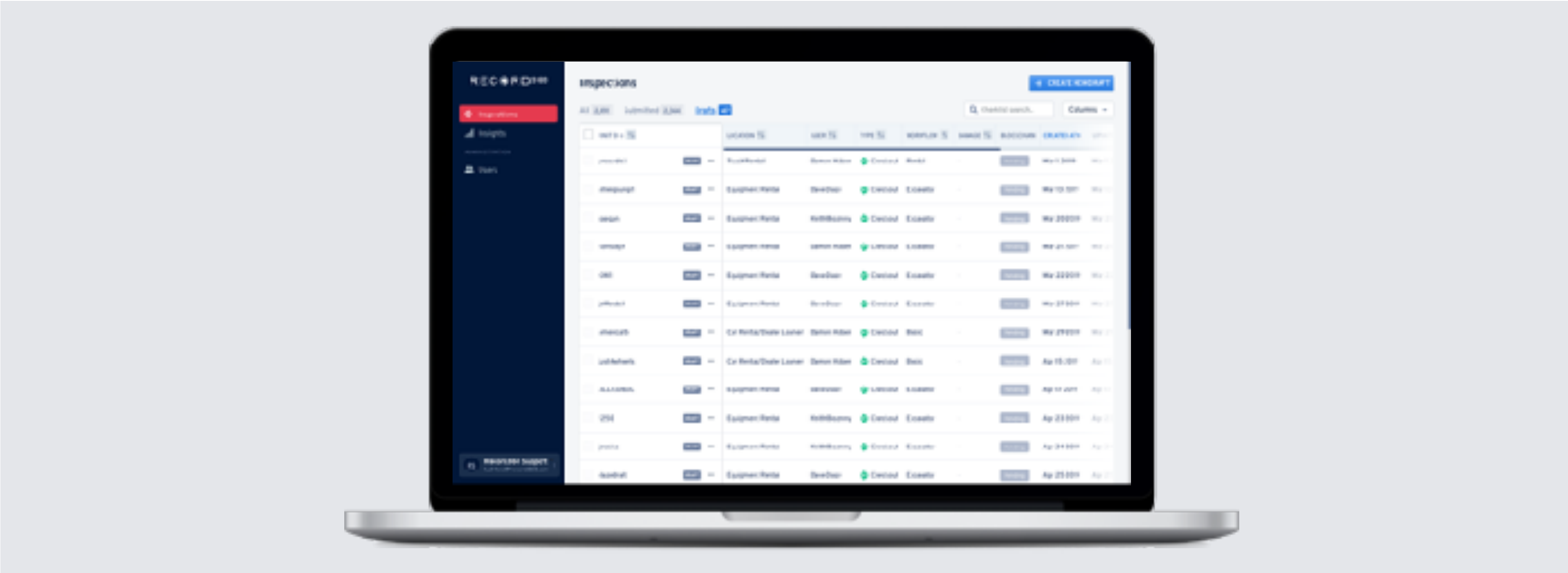
Draft List



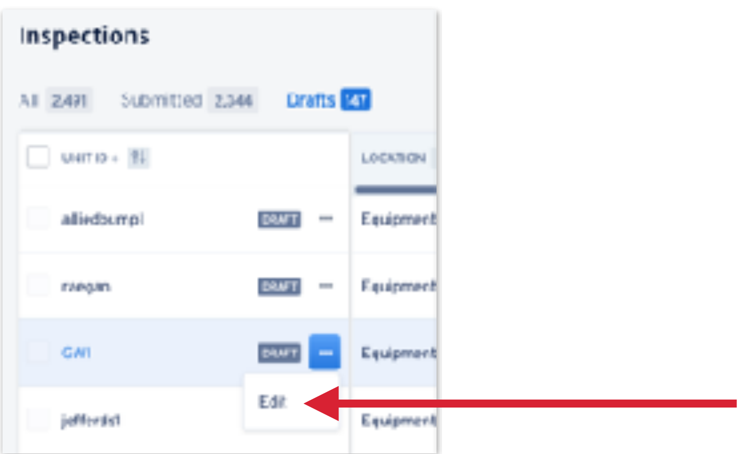
You can view a list of your drafts at any time by clicking on “Inspections” on the righthand side, and selecting the “Draft” tab at the top. This will show you a list of your open drafts. **Note, once a draft is completed on a mobile device, it will move to the “Submitted” tab.*



Edit a Draft



You can edit drafts as long as they haven't been completed on a mobile device. If you need to make edits to your draft, simply click "Edit" from the inspection list view.



RECORD360

Record360 is the industry's leading mobile inspection app. Our technology helps rental businesses streamline their processes and deliver an excellent customer experience. Record360 customers often see a 5-10x return on their money every month.

Questions or concerns?
Contact support@record360.com for more information.